

Unlock Exponential Growth with the 4-Page Growth Plan *Transcript*



Welcome!

[00:00:00] Welcome to ***“Draft your 4-Page Growth Plan.”***

This is designed to help you quickly go through and draft the important Core Growth Elements needed for growth.

The purpose of this exercise is to help you quickly and easily write things down. Trust your inner wisdom.

You will draft your 4-Page Growth Plan™ again and again. Every single version of your 4-Page Growth Plan™ is a draft. We get idea that we have to do things perfectly and it must be forever.

In business and in life everything is about ***knowing where you are and taking the next brave step.***

As long as you have a very **clear future** in sight where you're going, which this plan is going to help you always connect and reflect upon, then you will be able to know your highest and best use and the team's highest and best use.

Let's Dive In!

Give yourself permission to draft. Trust that the first quick iteration will create breakthrough. [00:01:00] Every iteration will create breakthroughs. Trust whatever insights and ideas come.

Trust you already have everything you need. Know, you will always be able to come back and iterate. You're going to go to sleep. And over the next couple of days, there'll be things that you're subconscious, you're unconscious it's going to keep working on. And you'll start to have insights in areas where you're not clear today, but you will be clear as time goes on.

Give yourself the gift of imperfect completion. There's going to be some things you just do not know the answer. And it's okay. It's safe to not

know. This is the important piece about creating growth. It's also okay to guess. The 4-Page Growth Plan™, you'll see a template you can download.

The act of writing it down-- that neurological processing-- will help you program your brain to focus on the things that a CEO needs to focus on. We focus on all kinds of stuff. Usually not what really creates growth.

[00:02:00] These are the four pages --and it's really divided into the **Four Critical Areas of Alignment** that your company needs in order to grow.

What's super cool is that it aligns you with the four areas:

- Knowing your Purpose,
- Knowing Who you Serve,
- Knowing your Plan, and
- Knowing your Highest and Best Use.

The Four Pages

The **first page** you'll see at the top is *Knowing your Purpose*.

The second half of the first page and the whole **second page** is all devoted to *Knowing Who You Serve*.

And then the **third and fourth pages** are *Knowing Your Impact Plan*.

Self Grounding

Take a moment to breathe into your heart, put your hands on whatever's in front of you and your feet on the ground.

Just take a moment to ground yourself and know that you have everything you need in this moment and every moment.

Trust that beyond the part of you that [00:03:00] is thinking and analyzing lives a part of you that is knowing part of you that is wise. That part of you is present. That part of you is here right now.

Know Your Purpose

As we step into the **4-Page Growth Plan™**, go ahead and have it in front of you with your pen.

Inception Story

We're going to start out with the **Inception Story**. In the first box, you're going to write down the story of how your company began. Just simply write,

"We started the company when we discovered... blah, blah, blah,... there was a need for something.... and we wanted to fulfill it.... [00:04:00] And it's been our desire since the beginning to create... whatever... and for.... whomever...."

Go ahead and write it down.

Core Purpose

Now you're going to write your **Core Purpose**. *What is the fundamental reason why your business exists? What is the hope of what you would like to deliver to your customers? What is the transformation you would like to midwife [00:05:00] to those you serve? Write it down.*

100-Year Vision

Next, imagine It's a hundred years into the future. So go ahead and calculate the date. One hundred years from now. Your business between now and then has been creating good, growing impact, scale and profit, transforming lives. *Take a moment and imagine what that future world would look like.*

It's the picture of your future world of what becomes possible because your company exists.

Just start out by writing.. [00:06:00]

“Our vision is a world where...”

“Our vision is a world where a world where hunger no longer exists... A world where sustainable products solve the carbon crisis... A world where every child Learns to read.”

10-Year Impact Goal

Next is your **10-Year Impact Goal**. What would you want to create 10 years from now? What would that 10-year goal be? What would it look like 10 years from now?

What is a specific goal? How many customers? And what would the impact look like? 100 customers? 1,000 customers? 1 million customers experiencing X?

That's a good way to start. How many customers by 10 years from now? [00:07:00] And what is the transformation that they are going to experience?

Write it down. You've got this.

Core Values

Now, **Core Values**. *They are a recipe for how your company achieves its purpose, its vision, its goal.*

When you think about whatever you wrote down as the reason your company exists, your Core Purpose, you think about your 100-Year Vision, when you think about what you're creating in the world – consider your 10-year goal.

What are three attributes or qualities that you need every single day?

What are the things that will produce that result?

What are the essential [00:08:00] guiding principles, beliefs, values that need to be in place in order to create that kind of a goal and live out that purpose, and live out that vision?

A world where hunger no longer exists or every child learns to read. What would the qualities you would need to bring to the table?

Nice job. You've just created The Know Your Purpose section.

Know Who You Serve

So just take a breath and move on to the next. Who You Serve.

Who They Are

Ask yourself who is my customer? Ask yourself **Who They Are**. *This is a clear and simple description of who your customer is.* Of your Authentic Customer. Including any psychographics and demographics.

Soccer moms who long to have more joy and freedom as an example.

Who is your customer?

CFOs who are [00:09:00] overwhelmed with lack of information from their existing systems.

CEOs who are trying to meet the needs of their private equity owners. Who are they?

Write down who they are.

Whatever you write is perfect.

What They Need

Then write **What They Need**.

These are your specific problems your Authentic Customer needs you to solve. *Wants, needs, desires, challenges, points of pain.* What are the

three challenges that they need a solution to? And it's a solution they'll pay a lot of money for.

It's something that, *"I would pay anything if you could solve this!"*

It's not a vitamin. It's a painkiller.

We need to know what that pain is, to understand and drive a solution.

Not just marketing value, [00:10:00] but to innovate a solution in your company that is truly remarkable.

WHO + WHAT Statement

And next is a simple **WHO + WHAT Statement**.

*It's a summary of **Who They Are** and **What They Need** in a simple declarative statement.*

Our company helps CFOs who are struggling to report information and data clearly to their board.

We provide simple, comprehensive technology that integrates all their data.

That could be a simple WHO + WHAT Statement.

Who they are, and then, what the core problem is.

Take a chance, leap, write something down. You can change it later.

Macro Trends

All right, take a deep breath. Now we're thinking big picture about what's happening in the world. We look at the bigger picture reasons why your solution, your company needs to exist.

Macro Trends are the larger market [00:11:00] trends that validate the need for your company.

Only 3 percent of women founders achieve \$1 Million of revenue or more. This is a trend that creates a need for the Force for Good System.

What's a trend that could demonstrate that your company is needed?

Maybe you don't know what the specific facts are, but you know generally. Something's happened that AI that's disrupted. Something's happening in the economy. Something is happening that's causing this.

Triggers

Then, what are the Triggers? **Triggers** are the specific moments in time when a customer needs your solution.

Right before the board meeting-- that's the moment the CFO is pulling her hair out, trying to figure out how I'm going to put this data together for my CEO and for my board.

What are those triggering moments for your customer?

Preparing for your board meeting. Getting ready to have an investor meeting.

Think about what are those moments in your customer's life.

Those are the triggers.

Write down a **Trend** and write down a **Trigger**. [00:12:00] You can't do it wrong.

TAM, SAM, SOM

Then you're going to go back up to the **Total Available Market (TAM)**, **Serviceable Addressable Market (SAM)**, and the **Serviceable Obtainable Market (SOM)**.

Think about who your customer is first, and then come back and say, "So who is my market?"

The **Total Available Market (TAM)** is the total revenue opportunity available, if your product or service achieved a hundred percent market share in the entire industry.

If you were building a consulting business then you might go and find research that says there's \$52 billion in the whole business.

Or maybe you're selling haircare and the whole haircare is \$127 billion.

You can go to ChatGPT and probably find this data.

How big is your business? What is your market? How would you describe it on a really grand basis?

Then, what's the **Serviceable Addressable Market (SAM)**, the portion of the total available market that your [00:13:00] product or service can target over its lifetime, the company's lifetime?

What is that SAM? "This is the universe we want to focus on." Maybe we're not going to focus on all of the businesses out there. We're going to focus on those that are in financial services. Those that have between 100 and 1000 employees and are in financial services. That could be a Serviceable Addressable Market.

And then think about the portion of your SAM that you can realistically capture considering your competitive advantages and market reach. This is the **Serviceable Obtainable Market (SOM)**.

Think about it over a 10-year period. What is that SOM? What is that market you could penetrate?

"I'm looking to get 3 percent of the total U. S. market of consulting, serving companies from a hundred to a thousand employees in financial services."

What's that total market that you want to service in 10 years?

Trust Your Answers

Trust whatever is showing up for you and notice there's moments where you [00:14:00] feel good and there's moments you feel overwhelmed, but these are the questions that are going to unlock growth.

Write down whatever comes trusting yourself, that it's plenty for right now.

What You Offer

Next is **What You Offer**. *It's a short, clear description of what you sell.*

I sell financial aggregation software. I sell shoelaces for children what is it you sell?

Write it down.

Competition

It's important to always have a sense of your **Competition**. We can collaborate with our competitors. We can learn from our competitors. Also our competitors demonstrate that we have a market.

Who are three other options—other companies out in the market—that are serving the same market as you?

These are the other options available to Authentic Customers most closely resemble your company. Write three [00:15:00] down.

Market Position Statement

Next is a **Market Position Statement**. *It's a declaration that summarizes your brand's unique value and its promise to the market.*

It's saying, *"I serve this market with this particular benefit."*

I serve this market of children learning to tie their shoes. And I do so in a way that is fun, playful, and builds confidence.

This is how you're positioning yourself. Take a chance and write something down.

Area of Chosen Greatness

Next is your **Area of Chosen Greatness**. I love this one. *This is the unique strength in which you choose to excel—which sets your business apart and fulfills a key customer need.*

Where you're going to **invest 10 times the energy and resources** to make sure it's remarkable.

What's the area you want to be great? Trust whatever comes. [00:16:00]

It can take years for this to be discovered—be excavated.

But right now, whatever feel would be how you want to be great as a company.

Three Feelings to Cultivate

Our customers are coming to us because they have a problem and need a solution. As they go through the journey, they're going to start to feel new feelings. You might come to us feeling frustrated, angry, or confused. Throughout the journey we want to cultivate feelings of confidence, security, pleasure, or joy.

What are the **Three Feelings to Cultivate**—feelings your customer is wanting to feel?

How do they feel when they're having the problem?

And what would be the opposite of that? Three feelings. The more specific you can be about the feelings, the better.

Three good feelings.

Impact Mantras

The next one is **Impact Mantras**, and these are things that you discover as you're leading your company that you [00:17:00] say.

Guiding phrases with your team about how we work together.

I always say, *"Catch people doing the right thing."* In other words, always be looking for ways to praise people.

"Listening for other's unspoken wants and needs." This was one in my business at Allumé.

"How can I support you?" It's a mantra. It's a way that we always use over and over again. We train on people to say, "How can I support you?" Somebody is upset. "How can I support you?" Rather than defensiveness? "How can I support you?"

What are your guiding phrases? You repeat with your team to keep priorities top of mind and support the team's purpose. Write a few down.

Three Customer Experience Improvements

And then there's **Three Customer Experience Improvements**. At all times, we are always improving the Customer Experience. We can improve our product or service in fulfilling the transformation or purpose that it's meant to provide.

At any given time, the *three areas your team is focusing [00:18:00] on making improvements*.

What are three improvements you'd like to make? Maybe it has to do with your customer service. Maybe it has to do with your product. Maybe it has to do with the way you onboard a new customer. Maybe it has to do with the way you're selling and communicating with your customer.

Write three improvements down.

Offerings List

Next is knowing your product and service list. Now we're jumping to the top of page 2 and here's where you're listing your products and or product lines. List what you sell. Write down the unit price the unit cost, gross margin.

Take a deep breath and guess if you don't know.

TTM stands for "Trailing 12 Months," how many units you have sold in the last 12 months? Guess how many customers you've sold to in the last

12 months. Your [00:19:00] revenue for each product and total over the last 12 months. Just guess, guess, guess, guess. And then, you can do some quick math around your average revenue per customer for each product.

Then how much your total cost of goods was for each product. over the last 12 months. And that might be harder for you to guess, but you might be able to roughly.

Notice Where Answers Come Easily

If the answers are coming quickly to you, it's because it is an area where you are adept. If it's not, it's okay. It's pointing you that this is an area that as you improve this, you're going to get better at increasing impact scale and profit.

This is exposing an area where you can focus your attention.

What Generates Profit

[00:20:00] We look at total COGS, total gross margin, and then total margin per product. This week, run some reports and find out for sure what the numbers are. This is going to give you so much power because it's going to help you see **What Generates Profit**.

Which product has the highest gross profit per unit? Every time you sell it, has the highest gross profit? And it may or may not be the one that also generates the most gross profit for your company.

So circle which product generates the most gross profit total in the last 12 months. Star the one with the highest gross profit.

Growth Model

Next we have our **Growth Model**. It's based on your **Average Revenue per Customer**. Think about the average revenue in a year that I get from one customer. Write that down .

If over \$100,000, we would consider it a **Whale**.

If it's \$10,000 to \$100,000, it's probably a **Deer**.

And if it's [00:21:00] somewhere above \$10, but under \$10K per year, it's probably a **Rabbit** model.

And if it's a \$100 and up to \$1,000. It's a **Mouse** model.

How we grow a company is different depending on the Average Revenue per Customer. The Growth Model we use is different.

Select which Growth Model it is.

Are you a Whale, a Deer, A Rabbit or a Mouse?

Later on, we'll dig into that.

Start to Know Your Numbers

Start to know your numbers.

What is your current Average Revenue per Customer per year. Say it's \$1,000 revenue. Then you would say, *how many customers do I need to get \$100,000?* So that would mean 100 customers, right?

And then how many would you need to get \$1 million and \$10 million in revenue? And how many customers would you need to create \$100 million? This is starting to help you understand what growth looks like.

Approximately how many customers you need in order to create \$100,000 in revenue, \$ 1 million in revenue, \$10 [00:22:00] million, and \$100 million?

Customer Enrollment & Retention Funnel

The **Customer Enrollment & Retention Funnel** is a very important piece. This is the *mechanism where you attract, engage, enroll, and retain your customers*.

This is where you *automatically elevate your relationship* with those you serve.

You move from **suspect** to **prospect**,

prospect to **offers**,

offers to **new customers**

and **new customers** to **satisfied customers** and **loyal ambassadors**.

Shine Your Light Channels

We're looking at the ways that you **Shine Your Light** in order for customers to find you. These are the *top of the funnel strategies* like social media, events and conferences.

How do new customers find you? What are the ways your business is generating leads? Referral sources? What does that step look like? These are your Shine Your Light channels.

Deliver a Profound Experience

Once they find you, the next thing you want to do is **Deliver a Profound Experience** before they buy from you.

What are those Profound Experiences? They could be [00:23:00] opt-ins of various kinds, reports, assessments, free trials. It could be meetings where you propose a solution to them.

Other Free (Low-Fee) Invitations

And then what are all the other ways that you invite them? If it's a Whale type, you might need to work on that sale for years. If it's a Mouse, you're going to have very different ways of marketing. It's all going to probably be electronic social and technology driven versus person to person driven.

So what are those ways that you deliver experiences?

Ask Them to be Your Customer

And then how is it that you Ask Them to Be Your Customer? It could be simply, the sales page or your trial has run out. Or it could be a more involved, day long pitch , if you're doing a multimillion dollar sale, for example.

Connect & Nurture

Then what are the ways that you **Connect & Nurture**?

Just write down all the ways that you *Shine Your Light, Deliver Profound Experiences, Invite Them to Be Your Customer*, and *Connect & Nurture* ongoing.

12-Month Customer Enrollment Goals

Then you also have a way to measure each [00:24:00] of those stages. **12-Month Customer Enrollment Goals.** Set some goals for 12 months out. Write the date for 12 months out.

The easiest way is to start with **customers**. *How many customers do I want to be able to generate 12 months from now?* How many customers do I want to be able to bring in? Write that number down.

And then say, okay, in order to get that many new customers, how many **prospects** would I need to have? How many people that sign up for my opt in or sign up for a free meeting or do a free trial? How many would need to sign up in a month?

And then, how many **suspects** would you need? How many would have to see a social media ad, or meet me at a conference at my table or see me speaking at another event?

How many **customers**, how many **prospects**, and how many **suspects**, would you need? This is helping you determine your **12-Month Customer Enrollment Goals**. [00:25:00]

It's helping you see what you need to do to build a funnel that produces that result.

At the bottom is the **percent of suspects to prospects** and the **percent of prospects the customers**. You always want to improve their **Conversion Rates**.

If 50 percent are converting, maybe you want to move it to 60%. If 10 percent are converting, maybe you want to move it to 20. Where is it now? And where do you want it to go?

Know Your Impact Plan

Now we're going to focus on The Impact Plan. Think about this in terms of 10 years.

10-Year Impact Goal

You already have a **10-Year Impact Goal**. You set it earlier when we were looking on page one of Your Purpose section. Go ahead and write it down again. 10-Year Impact Goal. This is the specific 10 year goal, perhaps the number of customers that you want to serve and the transformation you want them to experience.

The next is a question about 10 Year Scale and 10 Year Profit Goals.

10-Year Scale Goals

Consider, how many customers do I want to serve 10 years from now? Identify [00:26:00] how many customers I want to serve, how many units sold I want to sell in a year, 10 years from now? What do I want my total revenue to be ? What do I want my average revenue per customer to be?

10-Year Profit Goals

Then you want to think about profitability goals. What's my gross profit margin? What's the gross profit margin that I want to have 10 years from now? Total gross profit per year. How much gross profit dollars do I want to have in 10 years? And how much total operating expenses? How much operating expenses, do you have now? And in order to serve your bigger scaled out company, how much will it cost you to operate in 10 years? And then what will be the net profit margin and total net income that you'll have?

You'll have your revenue minus your [00:27:00] gross profit minus your operating expenses equals your net income.

If this is all jumbled, don't worry. Write down whatever you wish you could have that you're familiar. \$5 million of net income in 10 years or \$20 million of net income, whatever the number is.

All right, take another deep breath.

And now we're going to move into the next section.

Assess Where You Are

Assess Where You Are. And this is where you are going to look to three of our assessments.

We have a **Stage Assessment**, the **Growth Readiness Score** and the **Traction Score**.

Stage Assessment

So first you're going to say which Stage you're in. Existence, Survival, Scaling, and Impact.

Growth Readiness Assessment

What your overall **Growth Readiness Score** is? And then what your **Purpose Score** is? Your **Who you Serve Score**? And your **Impact plan Score**?

Traction Assessment

And then you're going to understand [00:28:00] overall what your **Traction Score** is. And you're also going to see what's your **Customer Discovery Score**, what's your **Minimum Viable Product Score**. What's your **Customer Validation Score**, your **Product Market Fit Score**, your **Go To Market Strategy Score** and your **Scaling Score**.

This is going to help you see your strengths and your opportunities in places you can grow.

Profit & Loss Statement

Continuing to assess where you are... you're looking at your Profit and loss statement you're going to see your total units, revenue, COGS. What it was last year, year to date, the last 12 months. Trailing 12 months. And what your run rate is right now.

Forecast & Budget

And if you have a **Forecast & Budget**, you're going to put it in their total units, revenue, cogs, gross profit, etc.

This may be information you're going to need to collect from your accountant or bookkeeping. Do whatever you can, whatever you know about your forecast and budget for this year and [00:29:00] for next.

Write down whatever you know.

Focused SWOT

And now we're going to look at the next piece, which is your **Strengths, Weaknesses, Opportunities, and Threats**.

Think again about your 10 Year Impact, Scale, and Profit Goals.

What are the strengths your company can bring to the table to grow impact, scale, profit? Write down **three strengths**.

What are **three weaknesses**? Maybe it's a system. Maybe there's friction. Maybe there's a lack of a particular skill. What's holding back growth?

Then look to see what are **three opportunities**. Write three down. What are your company's three biggest opportunities that when leveraged will create the most momentum [00:30:00] right now?

What are some of the big threats your company is facing the dangers out there that you need to consider the risks and dangers? That could impact scale, and profit. Write **three threats**.

Seeing Where You Are

All right, so now you know where you are. You've got your 10 Year goals, your 10 year impact , 10 year scale, 10 year profit goals. You can see your Profit and Loss generally. You kind of have a sense of what stage you're in, how well you know your purpose. How well you know where you serve. Now you have a sense of your P&L from the last year. You know your strengths, weaknesses, opportunities, and threats.

So now you're going to build your plan.

10-Year Chronological Strategy

How I'm going to get from where I am today to that future state. We're going to create a **10-Year Chronological Strategy**.

First three steps, the first three years, we're going to do this.

Second three years, we're going to do that.

And in the last three to four years, we're really going to [00:31:00] focus on this.

So write it down.

“First, in years 1-3, we're going to focus on improving this... and growing this...”

“And then, in years 4-6, we're going to go focus on... and growing this other thing...”

“And then finally, in years 7-10, we're going to grow, grow, grow, and hit our 10 year impact scale and profit growth goals.”

So chronologically: first three years, second three years, third four years.

Strategic Priorities

Think about **Strategic Priorities**. *What are you going to focus on throughout? What three to five things do you want to keep center of mind all the time? What are the keys to your growth? It's a blend of purpose, impact, profit priorities that need to maintain in the years ahead.*

It's good to have your Average Revenue [00:32:00] per Customer. You want to grow that. Maybe there's a Gross Profit Margin you want to grow. Maybe improving a particular part of your sales funnel, marketing funnel, enrollment funnel. Maybe there is focusing on a certain aspect of your product or service that will be transformational and leans into your area of chosen greatness. A few strengths and priorities will help you get to your goal.

3-Year Milestones

Now we're going to map it out. Three to five goals, where you'll be—assuming you follow this plan—in three years?

Write down **3-Year Milestones**. Start with the date three years from now, December 31, 2028, what are three year milestones? Three things.

12-Month Milestones

What goals do you want to achieve between now and one year? It can either [00:33:00] be one year from now or it could be one year to your calendar to your fiscal year. Between now and then what do you want to achieve?

Strategy Versus Milestones

The **strategy** is giving you words to describe how you're going to grow, answers the question how, how you're going to grow. The **milestones** depict what that strategy looks like in three years and in 12 months.

12-Month Company-Wide Breakthrough Goal

Now you're going to choose **one goal**.

A **12-Month Company Wide Breakthrough Goal**. *The single most important company wide goal for the next 12 months.*

A goal that will move the company forward most profoundly, accelerating impact scale and profit.

Quarterly Goals

And then go ahead and write down your **Quarterly Goals**. Three company goals to achieve each quarter.

Key Performance Measures

Last but not least think about how you want to measure success. What are the key measures that you want to measure every [00:34:00] week in order to make sure you achieve your impact scale and profit goals? And to make sure you achieve your **12-Month Company Wide Breakthrough**?

What are the specific metrics? Units sold? Number of prospects? Number of meetings you have? Number of new trials?

Write down the things you want to measure and we'll help you create progress .

Acknowledge Your Progress

You thought about the puzzles of growth! That's going to help you.

You've also thought about sequence. Thought about all the changes that need to occur in order to create a new result.

Take a moment now to acknowledge yourself. Notice the new wisdom and insights you already received.

There's probably some unknowns. There's some gaps. Allow yourself the space to be fascinated and curious about those gaps rather than having any other kind of judgment about it.

Which questions were hard? Which were easy to observe? That's [00:35:00] helping you understand where your strengths are and where you're probably going to need others. Start to get a sense of how all this information is helping you see what you need to do.

What are the things you need to focus on? What's the puzzles that need to be solved next? What's your highest and best use?

Plant the seed that in the coming days and weeks you have now opened the channel of wisdom. Your brilliance is now going to start unlocking these puzzles. Helping you resolve these challenges so that you can be a Force for Good and create all the change in the envisioned positive goodness in the world that you imagine.

So trust and settle in that what you've created is absolutely brilliant and plenty and enough. Know that you can come back to it.

4-Page Growth Challenge

The 4-Page Growth Challenge is really about the next steps, which is to print out the 4-Page Growth Plan™, blank copies, and redraft it [00:36:00] every week.

If you do it every week, you're going to experience exponential growth.

You almost can't help yourself. You're going to unlock the puzzles of growth when you do this. You're going to pour your energy and your wisdom into the things that create growth.

You're going to start inviting your team to solve the problems with you that will help you grow. You're going to have a simple way for you to talk about what you're trying to do and align together.

Take a moment, go get a drink of water, refresh and acknowledge yourself.

You've just moved mountains. You've taken the time to listen within and now you're ready to go and create powerful results.