

5-Step Business Strategy Worksheet

Identify What's Holding You Back. Fix It. Move Forward.

I offer support to business owners to take back control, focus on one major issue, and create tangible momentum in 5 steps.

YOUR BUSINESS OVERVIEW

What are the strengths?

Examples:

- “We have strong customer retention and word-of-mouth referrals.”
- “Our product is unique in the market and gets great reviews.”
- “Our team has deep industry experience and strong networks.”

What are the weaknesses?

Examples:

- “Cash flow is inconsistent, and we don’t forecast properly.”
- “We’re over-reliant on the founder for daily operations.”
- “Our pricing strategy is unclear and erodes profit margins.”

What are the products you offer to your clients?

Where do you want your business to be?

Examples:

- “We want to double revenue and expand into a new region within 12 months.”
- “We aim to automate operations so the business can run without day-to-day involvement.”
- “We want to build a scalable product that attracts investors.”

PHASE 1: DIAGNOSE

Goal: Identify the most urgent or impactful issue.

Step 1: Pick the One Big Pain Point

Ask:

- What is frustrating me the most right now?

- Where am I losing time, money, or energy every week?

- If I fixed just one thing, what would change everything else?

Examples:

- Poor cash flow
- Unclear team roles
- Inconsistent sales
- No systems
- Customer retention
- Missing skills

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 **Quick Exercise:**

Write down your top 3 problems. Choose one that would make the biggest difference.

PHASE 2: ANALYSE

Goal: Understand the real cause (not just the symptom).

Use this framework:

- **What's happening?** (The surface problem)

- **Why is it happening?** (Dig 2–3 layers deep)

- **Who/what is impacted?**

- **What is it costing me: financially, emotionally, time?**

 **Tool:** Use a “5 Whys” exercise to get to the root cause.

PHASE 3: PLAN THE FIX

Goal: Create a practical, concise action plan.

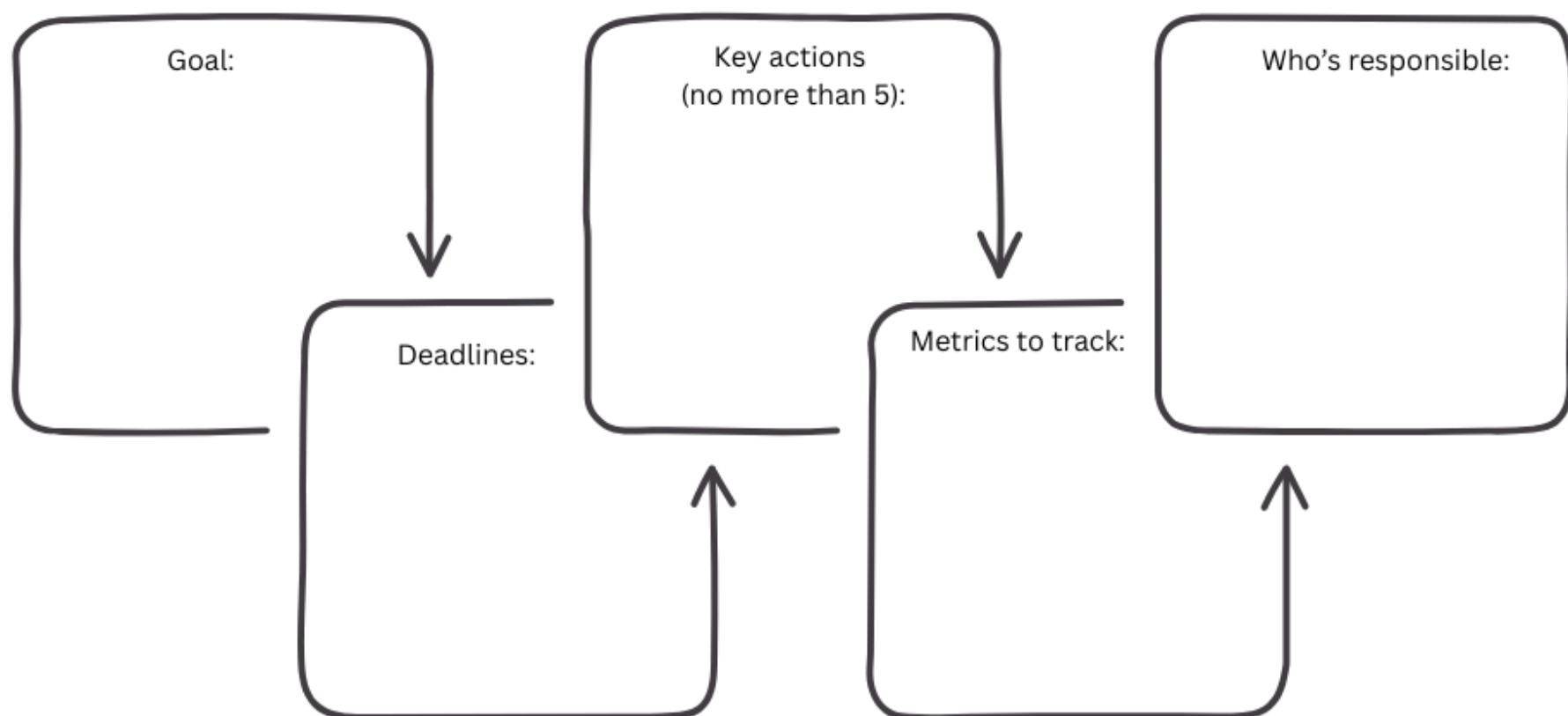
Use the 3P Framework:

People – Do I need to delegate, hire, or communicate better? Do I need to bring in skills that I don't possess?

Process – Is there a system missing or broken? What process can be replaced by a more efficient one?

Profit – How will solving this improve revenue or reduce cost?

Action Planner Template:



PHASE 4: IMPLEMENTATION

Goal: Take focused weekly action without overwhelm.

Weekly Check-In Template:

Date: _____

- What did I do this week toward the fix?

Something I'm proud of this week:

- What worked / didn't?

Obstacles, distractions, or delays:

- What did I learn or realise this week?

Insights, trends, or patterns I noticed:

- What's the one thing I'll complete next week?

Choose the single most impactful next action:

- Notes / Brain Dump

(Ideas, reminders, or anything else that came up)

💡 Tips:

- Batch time each week for strategy and protect it like a client meeting.
- Don't chase 10 things, stay on the *one issue*.

PHASE 5: REVIEW + RESET

Goal: Measure impact and prep your next sprint.

Review Questions:

- Did I solve the problem?

- What improved?

- What's still broken?

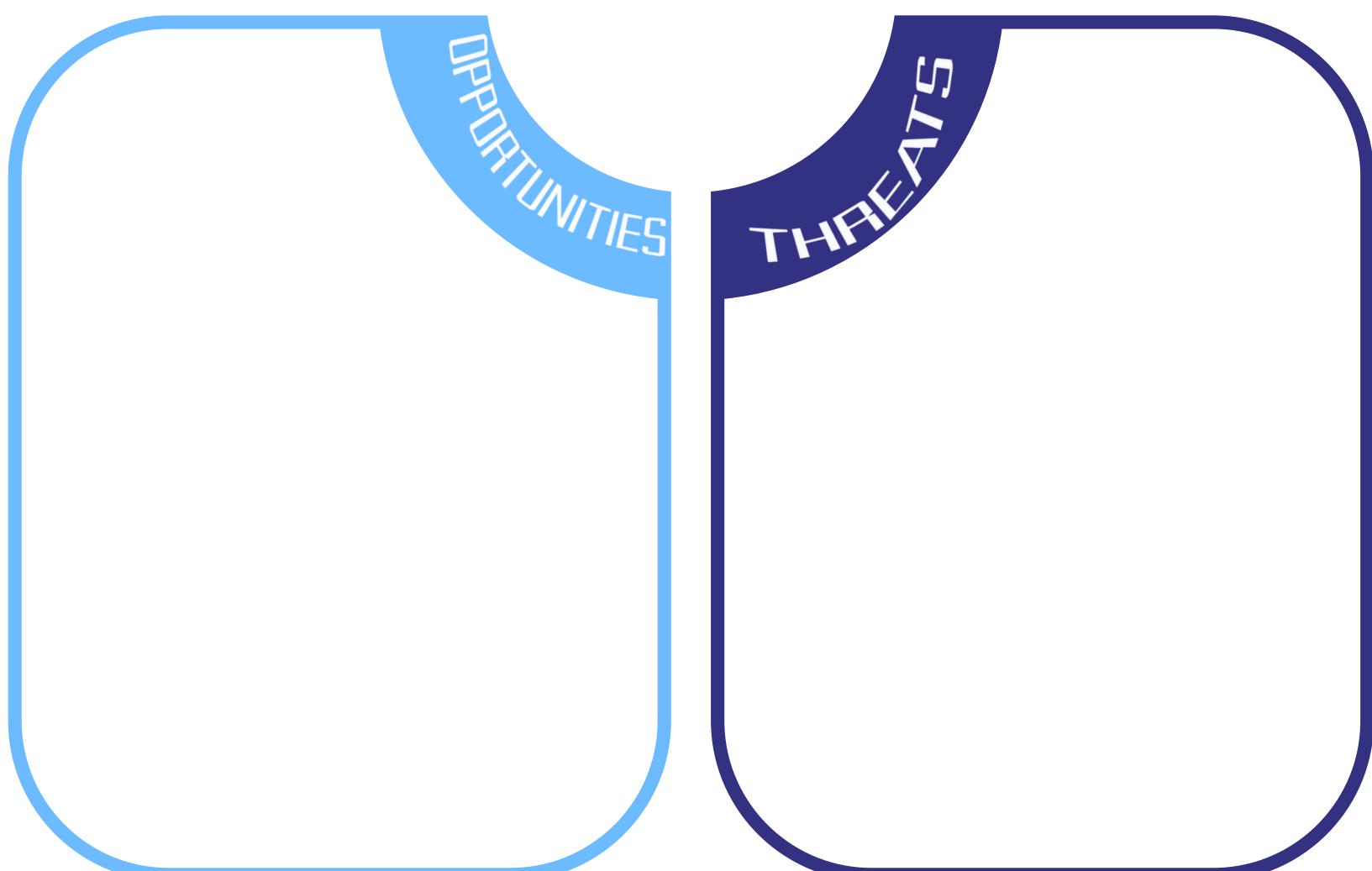
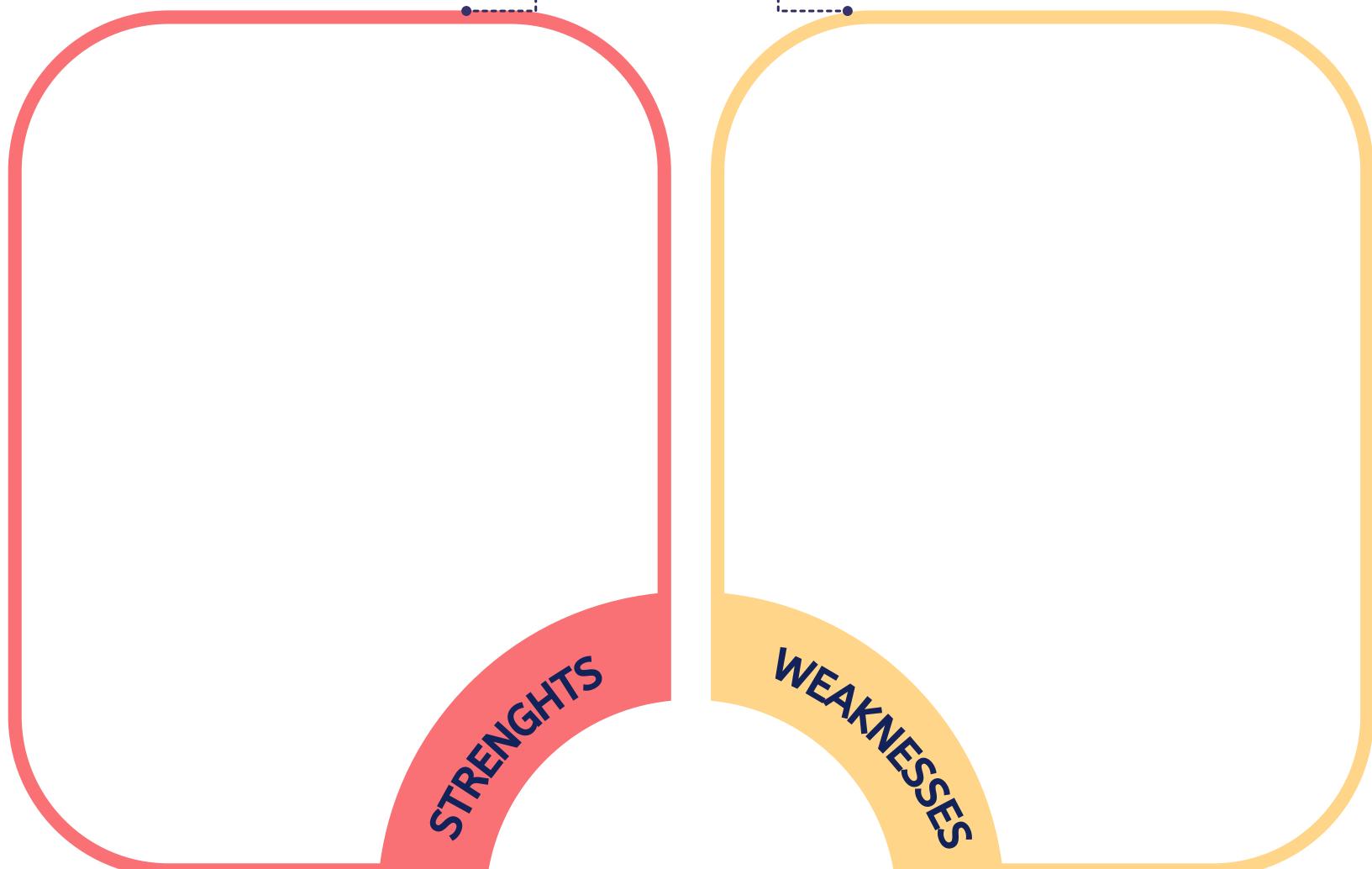
- What surprised me?

- What's the next challenge to fix?

Decide:

- Lock in what worked
- Delegate or automate ongoing tasks
- Set your focus for the next 90 days

BONUS SWOT ANALYSIS



BONUS 2

COMPETITOR SWOT ANALYSIS

