



Coach's CEO Toolkit

Business Project Plan

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How do I keep track of and effectively progress all of my business development ideas?

Use this project plan to keep those great ideas organized and centralized

Business Project Plan

As CEOs we have a lot of creative ideas. Stay organized so that when you are ready to spend your time on business development, you can pick right back up where you left off.

1. Content Creation

You are uniquely positioned to share messages to serve and bless others.

- Social media content
- Emails to your email list
- Articles for your blog
- Promotions
- Offers to consultations

2. Program Development Pipeline

Beyond your one-on-one coaching you may have ideas for other programs to market to your clients

- Group coaching programs
- Evergreen packaged and pre-recorded programs
- Podcast
- Book
- Webinar
- Masterclass
- Signature Talk
- New niche
- New service
- Mastermind

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3. Sales & Marketing

Expand your audience to find others who could benefit from your help.

- Find new networks to find prospects and business partners
- Seek out “watering holes” such as Facebook groups for your niche of prospective clients and support / serve in said groups
- Build audience on social media platforms by forming new connections
- Print advertising including posting in free forums locally

4. Business Partners

Consider partnerships to share value with each other's followings.

- Track relationships with partners, whether other people who market to your same niche with a complimentary service
- Consider collaborations including offering services or workshops to others' audiences, interviewing someone else or being interviewed for a podcast

5. Coaching Enrichment

Continue refining skills and personal development.

- Rewatching CCA modules
- Audit live dives
- Elements sessions
- Elements books
- Personal development and continued training
- Watch back recordings of consultations and coaching sessions to do SWOT (strengths, weaknesses, opportunities, threats) self-assessment on your own coaching for improvement

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6. Administration

Record key reference information related to your business and store related documents. Here is a list to get started.

- Certificate of Formation
- Employer Identification Number
- State Registration
- Bank Account Numbers
- Credit Card Numbers
- Insurance Policy Numbers
- Address
- Email Addresses
- Social Media Accounts
- Messaging Accounts
- Videoconferencing Accounts
- Web Hosting Accounts
- Financial Payment Processing Accounts
- Business Application Accounts
- Bio Photos
- Business Cards
- Logos
- Brochures
- Client Contract
- Licensing Contract