

FIRST 3 STEPS TO FREEDOM

**REIGNITE
CLEAR THE CHAOS
DOUBLE YOUR BOTTOM LINE**

"I learned more from J.C. about leadership and measurable processes in 6 months than from my 22 years in the Navy"

Dan Harmanstorfer
CPO Retired

J. C. SPEARRY

WWW.YOUR180MOVE.COM





Meet J.C. Spearry

Hi! I'm J.C.

For nearly 2 decades, as a business coach and sales trainer, I have helped over 100 clients and business owners of car dealerships, RV dealerships (in both fixed and variable operations), insurance agencies, financial planners, chiropractors and others remove the stress and chaos of their business and get their lives back.

I've taken countless business owners and high level leaders through a systematic, measurable process that helps owners remove the chaos and stop feeling overwhelmed in a business that has grown beyond their ability to control it.

My clients have found that they experience increased profits, smoother day to day operations and finally have the time and confidence to take well-deserved vacations.

If this resonates with you and you'd like some support in creating a well-managed business of your own, I invite you to a confidential consultation to discuss your specific challenge(s). I've provided options for how to do this on the last page of this guide.

Have you looked in the mirror lately and said,
"I sure thought my business would be much further
along by now."



symptoms
of a business
in trouble

*I've heard
comments like
these time and
time again.
Do any of these
sound familiar?*

"I feel like I'm "in over my head" and I'm almost drowning."

"Everyone is looking to me to guide them as their leader and tell them what to do. Nothing get's done without me. I feel like I have to do everything."

"If I took a vacation, I'd come back to a tragedy."

"It's so hard to find good help that I put up with too much crap from my staff. How would I replace them?"

"I look at the statements from my accountant, but I don't really understand them. If I'm so profitable on paper then where's the cash?"

"I can't believe I started this business. No one ever taught me how to do it. I've set myself up for failure."

THE 5 STEPS TO FREEDOM



The Road Map: 5 Steps to Freedom

As I mentioned earlier, feeling like your in "over your head" or like things are spinning out of control is a common theme while growing a business.

To explain what's happening, let me introduce you to a powerful framework for understanding the phases of business growth.

It's called the Five Steps to Freedom, and this is the roadmap I use to help my clients build a company that continues to progress and produce profits - even without your day-to-day involvement.

While these steps show a linear progression, it's normal for businesses to move back and forth between stages as they grow.



Research - Model - Launch

In the CREATION stage, you're beginning as an unknown in the marketplace.

Your work in this stage is to research a viable niche or approach for your business, develop a working prototype of your business model, and launch the enterprise.

While this is the first step in our model, sometimes even established business haven't taken the time to put together a solid business model or research an exact market niche.

A key part of the CREATION stage is creating a simple business plan. Most of the clients I work with either don't have a business plan or have a plan that is out of date.



Invest - Grow - Team

The CHAOS stage is every bit as chaotic as it sounds!

As you may have already guessed, this is the stage where things start to feel out of control and the symptoms we looked at earlier start to appear.

You may also experience “feast and famine” – an influx of clients and money, followed by a drought of not enough clients and a scramble to do some marketing – followed by an influx of clients and the cycle begins again.

Your goal in this stage is to begin to create systems.

Marketing systems. Team-building systems. Budgeting systems. Management systems.

Putting these into place will take you into the next stage and alleviate a LOT of the stress and anxiety.



Measure - Incent - Expand

In the CONTROL stage, you convert cash flow into profit by stabilizing and organizing your operations, measuring well chosen performance metrics, and fine-tuning and adjusting your business model.

This step involves more systems: organizing the business in such a way that YOU aren't needed for every decision, every sale, every day-to-day interaction with staff and customers.

When you reach the CONTROL stage, you'll be able to devote more time to working ON your business instead of IN it – so that you can move it to the next stage.



Economize - Systematize - Specialize

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Reproduce - Acquire - Harvest

Your final act is to reproduce yourself and develop a strong core of leaders who will continue to grow the business through partnerships, joint ventures, and acquisitions.

In the FREEDOM stage, other people are busy growing the business. You have free time and free cash flow.

This stage can allow you to retire and keep the business, while at the same time, making it attractive to a buyer should you decide to sell.

Implementing The 5 Steps

The 5 Steps to Freedom is our roadmap. Under each specific step there are projects to complete - 21 in total - that I call The 21 "Silver Bullets."

These silver bullets fall into the 3 major categories that ALL business problems boil down to: time, team and money.

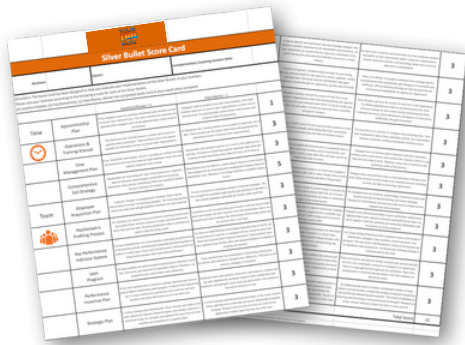
The first thing I do with my clients is a full diagnostic assessment to determine which projects they need to work on, and in what order of priority.

In this guide, I'm going to show you the 3 bullets that are the first steps towards fixing that stressed "out of control" feeling – and invite you to assess for yourself which of these are relevant to your particular situation.

The complete list of bullets appears on the next page.

If you want a full copy of the
22 Silver Bullets Score Card,
Just email me at
JC@Your180Move.com

Our Coaching System 22 Silver Bullets



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Time

1. Apprenticeship Plan
2. Operations & Training Manual
3. Time Management Plan
4. Comprehensive Exit Strategy
5. Delegation Skills

Team

1. Employee Acquisition Plan
2. Psychometric Profiling Process
3. KPI Measurement System
4. Performance Incentive Plan
5. Strategic Plan
6. Leadership Development Plan
7. Team Meeting Rhythm
8. Organizational Chart/Plan
9. Team Building Plan

Money

1. Current Business Plan
2. Break-Even Plan
3. Revenue and Profit Budget
4. Cash Gap Plan
5. Unique Selling Proposition & Guarantee
6. Sales Management System
7. Tactical Marketing Plan

The Solution To Chaos Lies in Systems

A well managed
business runs on
Systems.

When you have systems in place - well documented procedures, job descriptions and marketing systems - these systems run the business. You're no longer the bottle neck (the only person who can make decisions or who knows what's going on).

Well established systems mean that your team knows what to do and how to do it. They run the systems.

Your job is to lead the team.



- The Systems run the team
- The Team runs the System
- The Owner runs the Team

The 3 Bullets related to overcoming chaos will help you build systems and lead people more effectively.

The 3 Bullets to help overcome Chaos

Time

1. Apprenticeship Plan
2. Operations & Training Manual
3. **Time Management Plan**
4. Comprehensive Exit Strategy
5. Delegation Skills

Team

1. Employee Acquisition Plan
2. Psychometric Profiling Process
3. KPI Measurement System
4. Performance Incentive Plan
5. Strategic Plan
6. Leadership Development Plan
7. **Team Meeting Rhythm**
8. Organizational Chart/Plan
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1. Current Business Plan
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The 3 First Steps to overcoming Chaos

Over the past several years, I ran a business in which I was a partner while also coaching various service businesses. I noticed that 3 of the 21 Silver Bullets came up time after time, especially when the owner was feeling overwhelmed.

1. Time Management Plan

2. Delegation Skills

3. Team Meeting Rhythm

A **Time Management plan** will help you free up time working **IN** the business and help you work **ON** the business.

Delegation Skills allow you to off-load your work to members of the team

Your **Team Meeting Rhythm** ensures that your staff meet deadlines and you are kept in the loop.

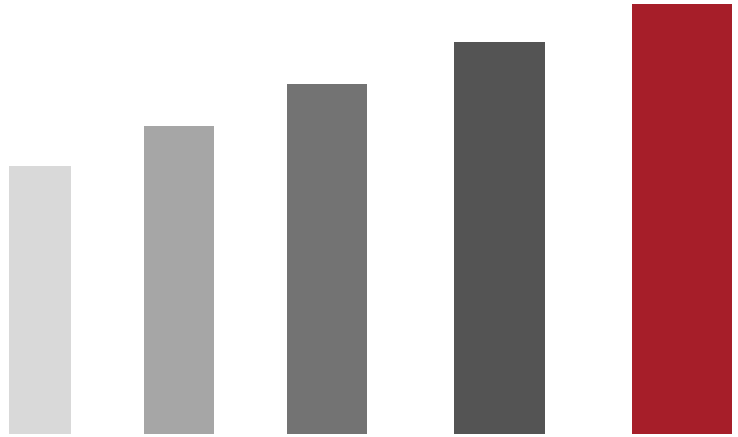
While not directly related to money, implementing these bullets will make you more profitable.

Well managed businesses will deliver more consistent and better service, keeping customers coming back

With your time freed up you can work on more business building projects.

You'll free up your time with increased productivity and reduce costs for training and attrition.

And Make Your Business Profitable



1. Time Management Plan

2. Delegation Skills

3. Team Meeting Rhythm

What are you
doing in
each of
these areas?

Over the next few pages we're going to take a closer look at each of these 3 bullets and you'll have a chance to assess your own situation on a scale of 1-5 to see where you need to focus first.

Taking a few moments to reflect on where you are now and to get clear on what you need to do may be the most important thing you'll ever do in your business.

To get the most out of this guide, answer the questions honestly: Low scores will flag the areas where changes will make the biggest difference.

To support you in making those changes, the time management section includes a specific piece of homework for you and I provide some book recommendations. If you'd like to speed up the process, I also included some information at the end of the guide about how my coaching works. Let's go.

1. Time Management Plan

2. Delegation Skills

3. Team Meeting Rhythm

Time Management

Taking back control of your time is the first step to taking back control of your business.

Many of the business owners I work with come to me exhausted, discouraged, and at the end of their ropes. “There’s not enough time in a day,” they tell me. “I’m working harder than ever just to keep my head above water. I know I need to spend more time focusing on the bigger picture, but how will I ever find it?”

Developing systems, training your team and getting your business organized will all take time.

So let's find some.

Rate your Time Management Plan on a scale of 1 - 5.



You are a master of your time. You take time each week to review and set priorities and block out time on your calendar to get them done. You delegate tasks to free up your time to focus on the important work only you can do. You work productively through the week, completing important projects and working reasonable hours.



You never have “enough” time. You’re primarily working reactively – dealing with urgent issues as they come at you, using email to manage your day. You find yourself putting off important projects because there’s always another fire to put out. You often work late or on weekends to try to catch up.



	Urgent	Not Urgent
Important	Quadrant 1 Crisis Pressing Problems Projects with Deadlines	Quadrant 2 Relationship Building Planing Recreation
Not Important	Quadrant 1 Interruptions Some Phone Calls Some Mail Some Reports	Quadrant 1 Busy Work Some Phone Calls Some Mail Time Wasters

Covey's 4 Quadrants of Effective Management

This framework comes from Dr. Steven Covey's classic book, *The 7 Habits of Highly Effective People*. In it, he proposed that there are four quadrants into which all tasks fall:

The first quadrant, important and urgent, consists of things you simply must do NOW like handling business crises or meeting important deadlines.

The second quadrant, important and not urgent, is the "quality time" quadrant. A good time management plan will increase the size of this quadrant because this is where long term growth and change happen. Quadrant 2 tasks include things like working on your business plan, developing systems and training your team.

The third quadrant consists of urgent, but not important tasks. These are distractions and interruptions, unimportant emails, tasks, and phone calls that compete for your attention in the moment.

The fourth quadrant, not important and not urgent, is the "time-wasting" quadrant: online games, trivia, unproductive meetings and so on.

Try This. Track Your Time For a Week

Want to make better use of your time? Begin by finding out how you spend it.

For the next business week, track your time. Using 30-minute increments, record everything you do as you do it. You can make a list on paper, use a spreadsheet or a time tracking app.

At the end of the day, go back and assign a quadrant to each of your tasks.

After tracking your time for the week, go through your logs to look for areas where you could:

- **Delegate:** are there tasks you could have given to someone else?
- **Defer:** are there lower priority tasks that could have been put off in favor of doing something more important?
- **Delete:** are there tasks that don't need to be done at all?

These are the pockets of time you can reclaim and put to use for implementing the next few bullets!

WEEKLY PLANNER

TIME	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							

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If you want a full copy of the 22 Silver Bullets Score Card, Just email me at JC@Your180Move.com

1. Time Management

2. Delegation Skills

3. Team Meeting Rhythm

Delegation Skills

When you delegate well, you'll save time, develop your staff and groom potential leaders in your business.

Delegation is a skill – and many people attempt delegation without really knowing how to do it. Sometimes, they micromanage people – which takes a lot of the leader's time and frustrates the employee.

More often, they simply abdicate the task – putting it into someone else's hands without enough guidance or supervision.

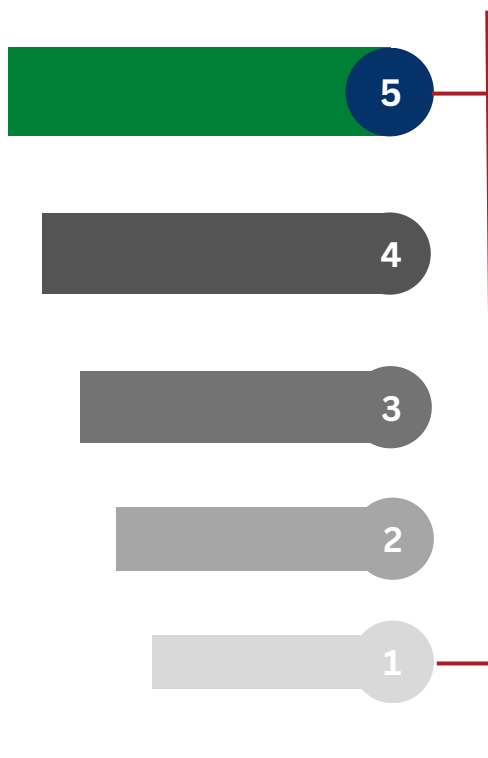
This leads to failure on the employee's part and a sense of "I can't trust anyone to do this work" in the leader.

In this section, you'll assess your current level of delegation skills.

Rate Your Delegation Skills on a Scale of 1 - 5

You constantly evaluate your own schedule to locate more tasks to delegate. You delegate appropriately based on your employee's level of competency for a specific task. "Who else could do this?" has become your guiding question.

You are a bottleneck in your business – everything needs to come through you. You resist delegating because "no one can do this as well as I can" or because you believe it will take longer to train someone to do it – it would be faster to just do it yourself.



What is Delegation?

To **delegate** is to entrust a task or responsibility to another person, typically one who is less senior than oneself.

Delegation isn't simply a matter of handing off tasks. You can break the process of delegation into 9 specific steps beginning with deciding who is going to do what, supporting them to do it and finally providing feedback upon completion.

Delegating in this manner sets both you and your employee up for success. While it may take a bit longer to do it this way, you'll make up for the extra time up front with better results in the end and less supervision along the way.

9 Steps to Effective Delegation

1

Define the task:

What needs to be done?

2

Select the individual or team:

Who is going to do it?

3

Assess their ability:

Are they capable of it?

4

Explain the reasons:

Why is this important?

5

State the required results:

How will we know when it's done successfully?

6

Provide resources:

What is needed to get the job done?

7

Agree on a deadline:

When will it be completed?

8

Support and communicate:

How is it going?

9

Give feedback on results:

How did they do?

Levels of Delegation

Using the 9-step delegation process is the first part of learning to delegate well.

The next step is to consider levels of delegation. How much control do you want to relinquish?

Most business owners, when I first start working with them, when they say they “delegate” – what they actually do is abdicate.

They just say “do it.”

There's no structure, there's no guidance, there's no feedback.

There is a wide range of freedom that you can confer on the other person – from supervising closely to having them handle everything with no involvement from you at all.

The more experienced and reliable your employee is, the more freedom you can give them.

Because delegation is an agreement between you and your employee, you'll want to check in with them to see how much freedom they are comfortable with.

High Responsibility

5

"Decide where action needs to be taken and manage the situation accordingly. It's your area of responsibility now."

4

"Decide and take action - let me know what you did (and what happened)."

3

"Give me your analysis of the situation and recommendation. I'll let you know whether you can go ahead."

2

"Look into this and tell me the situation. We'll decide together."

Lower
Responsibility

1

"Do exactly what I say." or "Follow these instructions precisely."

1. Time Management

2. Delegation Skills

3. Team Meeting Rhythm

Team Meeting Rhythm

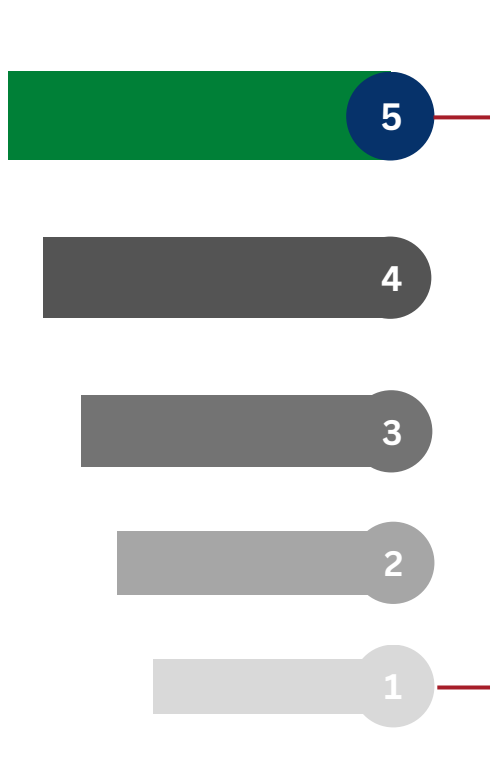
Your team meeting rhythm is a series of regularly scheduled team meetings for goal-setting, reporting, and accountability take place on an annual, quarterly, weekly, and daily basis. To do this, you'll want to consider the following:

- When do you hold meetings
- Who needs to be at each meeting
- What has to happen for the meeting to be successful

Common meeting mistakes include not meeting often enough, not having the right people in attendance and poor planning and meeting management – resulting in meetings that waste time and don't accomplish what they need to accomplish.

In this section, I'm going to introduce you to the team meeting format that has made the biggest difference for my clients: the Daily Huddle.

Rate Your Team Meeting Skills on a Scale of 1 - 5



A rhythm of regularly scheduled team meetings for goalsetting, reporting, and accountability take place on an annual, quarterly, weekly, and daily basis. Decisions made by shareholders' and upper management cascade through the organization quickly and efficiently.

There is no rhythm of regularly scheduled team meetings and the communication from shareholders and managers is inconsistent and inefficient. Off-site planning meetings are rare and decisions are communicated haphazardly throughout the organization.



The Daily Huddle

The huddle is a 15-minute meeting team meeting that takes place every day. This is the most sacred part of the day. Mandatory attendance.

The huddle consists of 3 major agenda items:

- 1** **What we're working on.** Each member of the team shares what they're up to over the next 24 hours. This gives you an opportunity to make sure everyone is working on the right things and to shift their priorities if necessary.
- 2** **Measurement.** These could be in time, money or percentage complete – what's important is the progress is measured. When you look at numbers every day, you'll spot patterns and trends faster.
- 3** **Issues, constraints and problems.** Is there anything that is going to keep people from being effective over the next 24 hours? This is the time to address issues and get them out of the way.

Summary

1. Time Management

2. Delegation Skills

3. Team Meeting

When your business has outgrown your ability to easily manage, there are 3 things that you can implement in your business that will help:

- 1** A **Time Management Plan** to help you focus on high-value tasks and delegate items you don't need to handle yourself.
- 2** **Delegation skills** to make sure that the work you give to others is matched to their level of capability and completed well
- 3** A **Team Meeting Rhythm** to ensure a good flow of communication, track progress and troubleshoot issues early

THE 5 STEPS TO FREEDOM



Summary

The Five Steps to Freedom is a roadmap you can follow to build a company that continues to progress and produce profits - even without your day-to-day involvement.

Feeling stressed, overwhelmed and like things are starting to spin out of control are signs that you're in the Disorder Stage of growth.

Implementing the systems discussed in this guide will help you move out of the Disorder stage and into the more pleasant (and profitable!) Control and Prosperity stages. The time and effort required will more than make up for itself.

My clients who have done this work report increased profits, smoother day-to-day operations and the ability to take well-earned vacations without worrying that everything will fall apart while they're away from the office.

If you'd like some support to do the same, read on to learn more about how business coaching can help you too.



Would You Like Some Help with This?

Moving your business from chaos to control is a journey that sounds simple when looked at from the 30,000 foot view in a guide like this, but feels a little more daunting at ground level on Monday morning.

Implementing the plans and systems covered in this guide will take time – and when you're in the "disorder" stage of business growth – time is what feels shortest in supply.

Business coaching can accelerate the process by providing an outside perspective to pinpoint the exact problems and help you create a specific custom-tailored action plan.

Coaches also provide the support and accountability to get the work done. Because if these projects are important, but not urgent, they are the most likely to be put off.

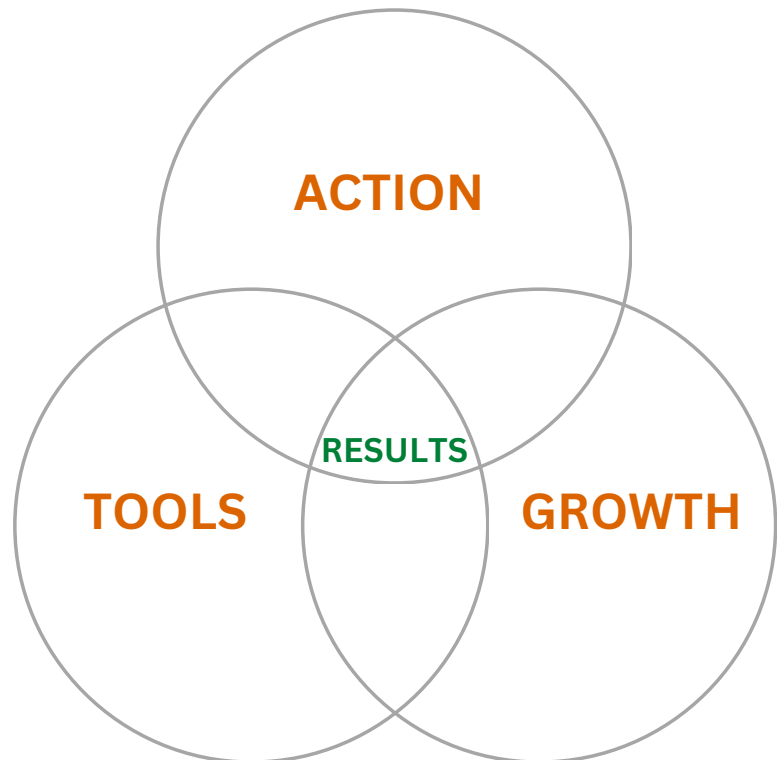
The next few pages will provide some insight into how coaching with me works so you can see what it would look like if we work together.

If coaching with me sounds like something you'd like to explore, I invite you to book a confidential 15-minute call so we can each assess whether or not it will be a fit.

How Business Coaching Works

I don't tell you what you "should" do.

It's your business and you get to decide what to do. I'll provide feedback, perspective and ask questions to help you explore your options. My role as a coach is to help you figure out the answer that is right for YOU. Since it is your answer and not mine you are much more likely to embrace and act on those ideas. And when you do, you'll get results!



You'll get coaching in 3 areas:

Business Tools: getting things done using proven tools, strategies and techniques.

Personal Growth: if the owner (YOU) wants to have a better business, first the business needs a better owner (YOU)!

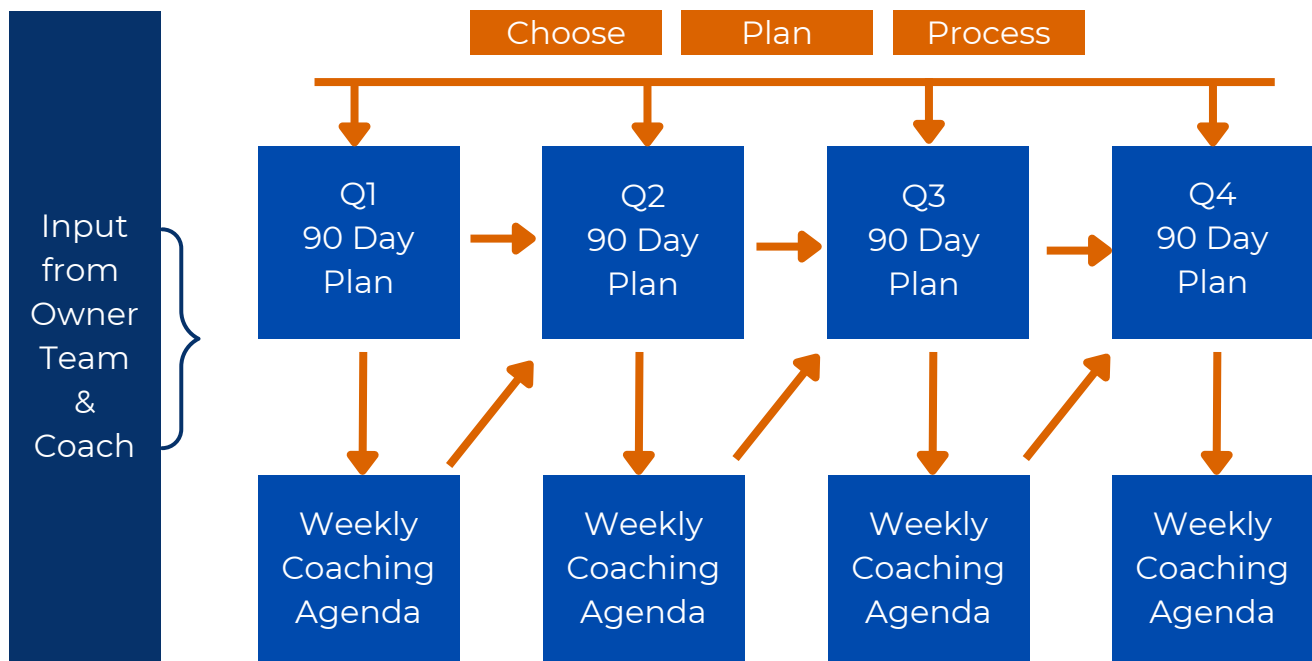
Action & Performance: while a coach can't do your pushups, the coach can help you to do more and better quality push ups!

Getting Started

This program starts the minute you commit.

You will fill out a comprehensive assessment – so that we know exactly where you are, what the problems are and where we need to focus next. This way we can make the most efficient use of our time and get the fastest results for you.

At the first meeting, we'll go over the assessment and create a 90 day plan.



Then we'll meet once per week to review your progress and go over any challenges you might be facing.

You will get one-on-one, personalized education on whatever you need: time management, goal setting, planning, sales and marketing, business systems, team management or success mindset strategies.

Coaching is an investment that usually begins to pay off immediately and will continue paying off over the life of your business. Everything you learn today you can continue to apply in the future.

Next Steps: Do you qualify to work with me?

I won't work with anyone who isn't actively working on their business and therefore getting a return on their coaching investment. It's a waste of money for you and a waste of time for both of us. I'm just as invested in the relationship as you are.

My reputation has been built over the years on happy clients and profitable processes and procedures. That's why I only work with business owners that meet a specific set of criteria:

This might be you if:

- You have a professional advisory business. (I also work with in-home sales industries- HVAC, Roofing, Windows, Kitchen/Bath.)
- You are an intelligent, ambitious, high achiever. You want to grow a successful business.
- You're willing to accept feedback, make changes and explore the world outside of your comfort zone. (This is where change happens!)

If coaching with me sounds like something you'd like to explore, I invite you to book a confidential 15-minute call so we can each assess whether it will be a fit.

**Click Here to Book Your
15 Minute
Complimentary Call**

Then if it looks like it will be a fit for both of us, we'll schedule a longer complimentary coaching session so that you can experience what coaching is like before you commit to a longer program.

To learn more about me and my coaching programs, you can visit my website:
www.Your180Move.com