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YOUR HR BUSINESS

SELF-REVIEW & PLANNER



HR Business Self-Review & Planner

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Welcome to the HR Business Self-Review and Planner

Let's take a look at your business now and into the future.

This is about review and reflection, not absolute accuracy. Unsure about some of the numbers and metrics? Just put down a ballpark estimate and move on to the next question.

Want some help to make things easier and faster? Let me help you.

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Let's get started!

A handwritten signature in black ink that reads "Ben".

Ben Geoghegan

Founder, Get More HR Clients



The Big Picture

Don't worry about getting everything to equal 100% right away. Get your rough estimates down quickly. Then come back and tighten up the numbers.

The Big Picture	Notes
Overall revenue target for the year	Example: \$£€200,000
Monthly revenue target	Example: \$16,666 (divide your annual revenue target by 12)
Weekly revenue target	Example: \$3,846 (divide your annual revenue target by 52)
Your mix of products and services (approximate percentages)	Example: <ul style="list-style-type: none">• 50% = Consulting projects• 35% = Monthly retainers• 15% = Product sales
Average sales price for products & services	Example: <ul style="list-style-type: none">• \$15,000 = Consulting project• \$1,300 = Monthly retainer• \$500 = Product (eg. online course)

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The Big Picture	Notes
<p>Annual sales required to reach your revenue target for the year.</p> <p><i>(Divide them by 12 to get monthly targets)</i></p>	<p>Example:</p> <ul style="list-style-type: none"> • Consulting projects = ~14 (this is the \$200,000 target divided by the \$15,000 average fee) • Monthly retainers = ~13 (this is the \$200,000 target divided by 12 for monthly installments and then divided by the retainer rate of \$1,300). • Product sales = 400 (this is the \$200,000 target divided by \$500 average price)
<p>Monthly sales required to reach your revenue target for the year.</p>	<p>Example:</p> <ul style="list-style-type: none"> • Consulting projects = ~1.2 (this is the annual sales required divided by 12) • Monthly retainers = ~1.1 (this is the annual sales required divided by 12). • Product sales = 34 (this is the annual sales required divided by 12)
<p>Your sales conversion rate (percentage of Wins from Proposals/Offers made)</p>	<p>Example: 33% conversion rate (1 new client from every sales meeting/process)</p>

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The Big Picture	Notes
<p>Number of sales meetings required per month to reach your number of monthly sales</p> <p><i>(The number of sales meetings required is equal to the desired number of sales divided by the conversion rate in decimal format. To convert the example of 33% to a decimal: Divide 33 by 100, which equals 0.33. Alternatively, move the decimal two places to the left: 33% becomes 0.33).</i></p>	<p>Example:</p> <ul style="list-style-type: none">• Consulting projects = ~4 sales meetings (this is the number of sales required (1.2) divided by 33% (or 0.33 as a decimal)• Monthly retainers = ~4 sales meetings (this is the number of sales required (1.1) divided by 33% (or 0.33 as a decimal)• Product sales = ~103 sales meetings (this is the number of sales required (34) divided by 33% (or 0.33 as a decimal) <p>(Listen to Episode 232 of the A Better HR Business podcast)</p>
<p>Big Goal #1</p> <p>(include KPI/measurement plus 3-5 Initiatives To Achieve Big Goal #1)</p>	<p>Big Goal:</p> <p>KPI/Measurement:</p> <p>Initiatives:</p> <ul style="list-style-type: none">• Initiative 1• Initiative 2• Initiative 3• Initiative 4

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The Big Picture	Notes
<p>Big Goal #2</p> <p>(include KPI/measurement plus 3-5 Initiatives To Achieve Big Goal #2)</p>	<p>Big Goal:</p> <p>KPI/Measurement:</p> <p>Initiatives:</p> <ul style="list-style-type: none">• Initiative 1• Initiative 2• Initiative 3• Initiative 4
<p>Big Goal #3</p> <p>(include KPI/measurement plus 3-5 Initiatives To Achieve Big Goal #3)</p>	<p>Big Goal:</p> <p>KPI/Measurement:</p> <p>Initiatives:</p> <ul style="list-style-type: none">• Initiative 1• Initiative 2• Initiative 3• Initiative 4

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Deep Dive Questions - Products & Services

Deep Dive Questions - Products & Services	Last 12 Months	Next 12 Months	What will you do to improve this?
How happy are you with the types of clients you're getting and the kind of work you're doing? (out of 10)			
How confident are you that you are offering the right mix of products and services? (out of 10)			
How confident are you in the quality, impact, client-friendly work you're doing for your clients? (out of 10) (ie. Are your clients really happy to be working with you and would gladly give you a referral or testimonial?)			
What can you do to increase your prices?			
Number of New Retainer Monthly/Annual Recurring Clients Won			
Number of Retainer Monthly/Annual Recurring Clients Who Cancelled :(

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Deep Dive Questions - Products & Services	Last 12 Months	Next 12 Months	What will you do to improve this?
What can you do to reduce churn /cancellations?			
What can you do to add/ increase the level of recurring revenue ?			

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Deep Dive Questions - Marketing & Sales

Deep Dive Questions - Marketing & Sales	Last 12 Months	Next 12 Months	What will you do to improve this?
How many clients did you work with this year?			
Who were your top three clients in terms of revenue?			
How did you find/get these clients?			
How confident are you that you have chosen the right target market? (out of 10)			
How confident are you that you have found the right marketing channels and can scale them up? (out of 10)			
How confident are you with your marketing effectiveness? The quality or 'cut-through' of what you're doing (out of 10)			
How confident are you with your marketing effort/Energy/Volume? Are you doing enough, often enough? (out of 10)			

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Deep Dive Questions - Marketing & Sales	Last 12 Months	Next 12 Months	What will you do to improve this?
What effective pieces of marketing content that convert visitors into sales leads did you produce? Eg. Ebook, Spreadsheet tool, etc.			
Total website traffic per month (new visitors to your website - from GA or your website)			
Total number of voluntary subscribers in your email/CRM software (voluntary means they added themselves to your list and you didn't just upload a bunch of email addresses yourself).			
Average number of new voluntary subscribers per month (check out Episode 232 of the <i>A Better HR Business</i> podcast for more on this topic)			
Number of speeches/talks webinars/etc you've given to third-party audiences			
Rate your presence and effort on LinkedIn . I.e. Posting regularly, commenting on other			

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Deep Dive Questions - Marketing & Sales	Last 12 Months	Next 12 Months	What will you do to improve this?
people's posts, etc.			
What has been the ROI (Return On Investment) of any paid marketing you've done such as Google Ads, LinkedIn ads, ads in newsletters, sponsorships, etc.			
What ' Pre-Conversion Events ' have you created to bridge the gap between marketing leads and new clients? These are sometimes also called 'immersive events' or 'hand-raiser' marketing events. Examples: Sales video, webinar, a 5-day challenge, workshop, etc.			
Your sales meetings quality (out of 10) (How confident are you that you run your sales meetings/calls well?)			
Your sales proposals quality (out of 10) (How confident are you that you produce effective and convincing sales proposals?)			

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Deep Dive Questions - Marketing & Sales	Last 12 Months	Next 12 Months	What will you do to improve this?
How confident are you in the efficiency + effectiveness of your overall sales process ? Eg Sales appointment bookings. Sales meetings, Proposals, etc.			
Rate your sales confidence and mindset (out of 10).			
Make a list of things you're proud of in this period. Use the sentence, "I'm proud of.." and list your accomplishments.	I'm proud of: <ul style="list-style-type: none"> ● This ● This 	I'll be proud of: <ul style="list-style-type: none"> ● This ● This 	

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Deep Dive Questions - Finances

Deep Dive Questions - Finances	Last 12 Months	Next 12 Months	What will you do to improve this?
How many recurring paid subscriptions do you currently pay (consider listing the recurring paid subscriptions so you can think about whether you need to keep each one)			
What are your approximate total monthly expenses , not including employee and contractor costs?			
What are your approximate total annual expenses , not including employee and contractor costs? (multiply monthly expenses by 12 and add on any other annual expenses incurred)			
Typical monthly employee costs			
Typical monthly contractor costs			
Approximate annual labor costs (include employees and contractors)			

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Deep Dive Questions - Finances	Last 12 Months	Next 12 Months	What will you do to improve this?
Total annual costs (add your annual expenses and labor costs together)			
How confident are you that you're maximizing cash flow well? (out of 10) (Charging enough, getting paid upfront or in installments, recurring payments, invoicing on time, etc).			

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Looking Forward

The Year Ahead	Notes
What will you do to add more Wow! to your products and services? Options include: faster, longer, add stuff, remove stuff to make it more streamlined, add technology, do it for them, etc.	
What will you do to increase your Average Client LTV? <i>Lifetime Value means how much your typical client pays to your business over one year (or whatever timeline you choose).</i> Options include: increase prices, upsell, cross-sell, go back with new services to old clients, etc.	
What will you do to increase the frequency or the number of times the typical client buys your products and services?	
What will you do to generate more recurring revenue?	
What will you do to get seen by more of your target market?	

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The Year Ahead	Notes
What will you do to get more sales prospects to say Yes?	
What will you do to make your business more scalable? Options include: adding salespeople, hiring staff, software, AI, etc.	
What will you do to make your business more enjoyable? Options include: hiring staff, removing staff, automating admin, saying no to the wrong clients, charging more, etc.	
The 1-3 words that will define your next 12 months	
What will you do more of this year to reach your goals?	
What will you do less of this year to reach your goals?	
Set an emotional reminder: What's your motivational song? (When you hear it, think about your goals and actions for success).	

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The Year Ahead	Notes
<p>How will you reward yourself if you hit your revenue goal in 12 months? (Choose something specific and tangible you can do or buy).</p>	
<p>Describe in detail how your business will look and feel in 12 months. Think about this and feel it every day so you know what you're working towards. You may even like to write this out as a letter to yourself to open in 1 year. Alternatively, use your phone to record a message to your future self - say what a great year it has been with this many clients and this much revenue doing this kind of satisfying work (and so on).</p>	

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Take Action!

Now it's time to take action!

Want some help to make things easier and faster? Let me help you.

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Have fun and let's talk soon.

All the best,

A handwritten signature in black ink that reads "Ben". The letters are cursive and fluid.

Ben Geoghegan

Founder, Get More HR Clients

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