



Foundational Concepts Worksheet

Foundational Concept

Crafting your businesses values + strategic priorities provides a solid foundation to grow your business. It provides a checks + balances system to Shiny Object Syndrome when you find yourself grasping to do all the things even if they don't support the direction you want to go. Visible values + priorities allow you to examine an opportunity or marketing venture + ask the question: Does this align with my values? Does this support or move forward my strategic priorities?

What are three core Business Values?

What are your three Strategic Priorities for the year? • It goes without saying people usually want to increase revenue - what priorities will achieve this?

Foundational Concept

Growth of a business requires clients; you need to attract, nurture + convert them in ways that align with your values + priorities. The way you talk + how you present yourself in the world are what I call Value Conversations, just what it sounds like, conversations that add value to your clients world. They also bring value to you + your world as they represent the things you care + feel compelled to talk about. Value Conversations also give you a framework to interact within while on social media sites to share the core elements of what your business believes + cares about. Ultimately, this will have a positive impact on the clients you attract, nurture + convert.

Who are the clients or market you want to attract?

What are three Value Conversation you want to have that can nurture your clients?

i.e. mine are overcoming project overwhelm, making your business work for you + what's your Step One?

How will you have these conversations?

What platforms will support your conversations?



Hi there -

As a small business bookkeeper I work as the liaison between you and your accountant. I help organize your money + projects by breaking them down into manageable tasks. Together we collaborate on what needs to happen to keep you focused + productive so wishful thinking becomes action.

I believe in intentional business building + setting up systems for sustainability to create a business you want to work in. Curious about my philosophy + how I put it into practice? I send a newsletter once a month with resources, techniques + practices I'm finding useful in navigating the small business world. You can sign up on my website. Looking forward to connecting.