



Create Your Roadmap

A Driven Business Owner's Guide to
Business Growth....
The Easy Way!

Jenna
Waites

Create Your Roadmap

Welcome!

The biggest complaint I hear from business owners in this crazy time is finding ways to shift or expand the business model and revenue stream.

Yet, when you are used to a routine and trying to keep up with the day to day it is often hard to figure out a new path that will allow you to grow and thrive.



This is the Roadmap I created years ago and has become a cornerstone for mine and many of my clients' businesses.

This will allow you to:

- **Better understand precisely where you are going**
- **Map out the exact road you will travel to reach your destination**
- **Determine what junctions you will encounter on this road to be prepared and equipped to handle them**
- **What you will need to pack or gather along the way to make your trip as smooth and painless as possible**

You don't have to waste time or energy!

So often when we are starting down a new path, we make a lot of missteps, encounter potholes we were not prepared for, and find that the turn we made actually put us further from where we wanted to be.

This is not only incredibly frustrating, it can often cause lost revenue or increased expense with no return.

I created this quick and easy guide to arm you with the essential step you need to help you focus your attention and efforts on creating the path that will lead to your successful growth.

Cheers to your Success,

Jenna Waites

President

Waites Ventures

Create Your Roadmap

WAIT... a Note on How to use this Guide

This is not just another thing for you to read, get excited about, file away, and then never implement!

You took this step to make a change and improve your business so TAKE ADVANTAGE to the material given to you and actually implement this Roadmap.

It is too easy just to read information and think that it will change our lives. However, we retain less than 10% of what we read and when life gets busy, the last thing we think about are the changes we wanted to make.

There is a power in actually writing things down instead of just working through them in your head.

And in this case it will be your constant guide to help ensure you stay on the course and don't get distracted by the fun attractions that will pop up along the way begging for you to take detour....don't get sucked in by the lure of seeing the World's Biggest Ball of Paint!



Now it is time to get started and make sure you complete ALL the "Action Items" AND Worksheets TODAY!

Remember, reading this isn't for fun; you want to Grow Your Business!

Create Your Roadmap

6 Core Questions

1. Where are you going?

Too often we have very abstract ideas of where we want to go which makes our goal a moving target.

It is crucial to be completely clear on the exact results you are looking for. Make sure your Roadmap vehicle is specific so you know how you are going to get to your destination.

2. What, how and when will the journey and destination be tracked and measured?

With a concrete vision you will now be able to decide what metrics to track, how to track them, and when. This will ensure you stay on track and when the destination is reached.

3. What steps must be taken to arrive at your destination?

Break down every step needed to reach your destination.

4. What decision(s) will need to be made?

To complete all the steps, will any decisions need to be made along the way? If so, by whom and what information will they need?

This will allow you determine if you can proactively make the decision at the beginning, or let your team know what information will need to be presented to help you make the decision, or to empower others to make the decision.

5. Who will be responsible for each step?

Decide who will be completing each step and who is responsible for overseeing it.

6. What resources are needed?

For each step establish if any resources are needed. This will allow you to either prepare them before setting out, or be prepared to make a time, effort, and/or monetary investment when the time is needed.

Create Your Roadmap

How to Create Your Roadmap

1. Destination

This is your main goal and what you are aiming for. Think about what issue you are trying to solve or dream you are trying to fulfill. If you have multiple destinations, you will need to fill out multiple Roadmaps.

2. Vehicle

Your vehicle is the means by which you are going to reach your destination. You will need to determine what exactly you are doing to do to get to that destination.

You can start with a generality but then you need to get specific about exactly what this vehicle looks like and will accomplish.

NOTE: You may also have more than 1 Vehicle to help you reach your Destination. That is OK; you just need to make sure you create a Roadmap for EVERY vehicle.

To avoid overwhelm, I recommend working on 1 Destination and 1 vehicle at a time.

3. Start and End Dates

Your start date will be the date you begin your journey and should start working on your first activity/task.

Your end date will either be the date the entire project is complete OR the date an ongoing project should implemented and live.

4. Measures of Success

This is where you have to get PRECISE on what you will track and measure so that you know when you have made it and if you have been successful.

Otherwise you could stretch the road out indefinitely trying to reach a moving target.

This will also allow you see if you are still on track, or if tweaks need to be made.

Create Your Roadmap

5. Activity/Task

Here you will list EVERY activity or task that needs to be accomplished to move your Roadmap forward.

It is good practice to list them in order of when they should be worked on. Therefore, when one task is complete it will be easy to see what is next on the list.

If you have activities/tasks that cannot be worked on simultaneously, you can develop a number/letter system that allows everyone involved to easily see what they can work on now, and what they will have to wait until another step is complete.

6. Resources Needed and/or Decisions to be Made?

As you've already determined from your 6 Core Questions, notate any resources you will need and any decisions that might need to be made to successfully complete an activity/task.

7. Who is Responsible

There might be multiple people involved in a particular activity/task, yet here you want to indicate the person ultimately responsible for its execution and completion.

8. Due Date

To ensure you continue to move forward it is important to specify target dates when each step should be completed. This helps keep us focused and not allow less important things to distract us.

Deadlines are very powerful and essential if you want to actually reach your destination!

Sample Roadmap

Destination: Sales Consistency

Vehicle: Increase Sales from Referrals

Describe Vehicle in Detail:

Create process to ask more clients for referrals and ensure 100% follow up.

Start Date: 3/4

End Date: 6/30 (Implementation)

Specific Measure(s) of Success:

80% of clients are asked at 3 different points for a referral. 100% of referrals are contacted within 2 business days. 30% of referrals are converted to clients within 3 months of implementation.

Specific Activity / Task	Resources Needed / Decisions to be Made	Who is Responsible	Due Date
<i>Identify Points of contact</i>		<i>Customer Service manager</i>	<i>3/24</i>
<i>Develop content and method of ask</i>		<i>Customer Service manager</i>	<i>4/3</i>
<i>Determine and develop referral capture system</i>	<i>New software – Owner’s decision</i>	<i>Administrator</i>	<i>4/16</i>
<i>Create referral offer</i>		<i>Owner</i>	<i>4/28</i>
<i>Develop referral offer process</i>		<i>Sales manager</i>	<i>5/10</i>
<i>Determine tracking metrics and method</i>	<i>Tech consultant to setup new reports</i>	<i>Administrator</i>	<i>5/35</i>
<i>Implement referral capture system</i>		<i>Administrator</i>	<i>6/23</i>
<i>Train and implement referral offer process</i>		<i>Sales & CS managers</i>	<i>6/26</i>
<i>Tracking and reporting setup</i>		<i>Administrator</i>	<i>6/26</i>

Roadmap

Destination: _____

Vehicle: _____

Describe Vehicle in Detail:

Start Date: _____

End Date: _____

Specific Measure(s) of Success:

Specific Activity / Task

**Resources Needed /
Decisions to be Made**

**Who is
Responsible**

**Due
Date**

Specific Activity / Task	Resources Needed / Decisions to be Made	Who is Responsible	Due Date

Create Your Roadmap

Action Items

- Determine your Destination
 - Outline the Vehicles needed to reach your Destination
 - Print the Roadmap on the prior page and complete for each Vehicle
- OR Download a fillable digital Roadmap by [CLICKING HERE](#)
- Send me your feedback for future training materials; let me know what formats you find most useful: Feedback.JennaWaites.com/

