

ULTIMATE

PROFIT PLAN

WORKBOOK



Creating your Custom Roadmap:
the Same Pager



CREATING YOUR CUSTOM ROADMAP: THE SAME PAGER

Let's explore the power of a simple yet often overlooked business strategy: the **Same Pager™**. This one-page document has proven to be a game-changer for many businesses, including one client who added **\$30,000 in profit in just a week** after implementation.

Even after years in the industry, I still find that many successful 7-figure business owners lack written annual plans. I cannot emphasize enough the importance of having a clear roadmap for your business. Just as you need both a pickup and drop-off location for an Uber ride - your business needs defined starting and ending points for effective planning.

WOO's **Same Pager™**, was initially offered as a one-hour training, but we expanded it to a four-week program because of its incredible impact. This one document consolidates goals, mission, vision, and values, ensuring everyone in the organization is on the same page. The benefits are incredible! Think: improved communication, focused decision-making, and enhanced team cohesion.

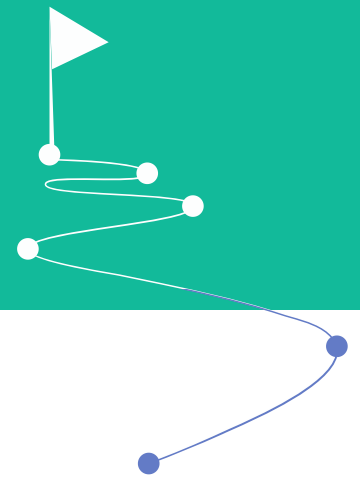
Financial awareness is a crucial. Many CEOs operate on gut feelings rather than hard data - which can be risky.

Let's address transparency about financial goals head-on. Openness about company finances isn't just a nice-to-have; it's a crucial element for team alignment and understanding. When we educate our team members about the financial realities of the business, we create a shared sense of purpose and responsibility.

Throughout the chapter, I stress the **significance of foundational work in business**. While it might be tempting to skip to the **"good stuff,"** don't overlook these crucial elements that form the bedrock of a successful, well-aligned organization.



STACY TUSCHL
Owner & CEO Well-Oiled Operations



THE SAME PAGER™ ROADMAP

The Same Pager™ Roadmap is a concise, one-page document that aligns an organization's goals, mission, vision, and values. Here's a condensed version of its key components and benefits:

PURPOSE AND COMPONENTS

- **Goals:** Annual objectives, including revenue and profit targets
- **Best Seller:** Identify the most profitable product/service and its sales target
- **Key Objectives:** List the top 3 objectives to achieve goals
- **Organizational Chart:** Clarify structure and reporting lines

BENEFITS

- **Improved Communication:** Ensures all team members understand the company's offerings and direction
- **Focused Decision-Making:** Aligns priorities and reduces "shiny object syndrome"
- **Enhanced Team Cohesion:** Clarifies goals, reducing interdepartmental conflicts

ADDRESSING COMMON OBJECTIONS

Sharing Revenue Goals:

- **Educate team on the full financial picture, including:**
 - Profit margins
 - Tax implications
 - Cash reserve requirements



KEY POINTS:

- Transparency can prevent misconceptions about company finances
- Share detailed information only with key players and full-time employees
- Raises should be based on individual performance, not company profits

 MISSION STATEMENT:

CRAFTING YOUR ORGANIZATION'S PURPOSE

A **mission statement** is more than just words on paper. It's the heartbeat of your organization, defining your purpose and guiding your actions. What you need to know about creating a mission statement:

1 DEFINITION AND PURPOSE:

- Defines what you do and who you are today
- It's the organization's reason for existence and core purpose

2 CREATING YOUR OWN MISSION STATEMENT:

- The importance of crafting it yourself rather than outsourcing - avoid generic, consultant-created statements
- Personal involvement ensures authenticity and captures true company culture

3 COMPONENTS OF AN EFFECTIVE MISSION STATEMENT:

- Clear purpose: What problem does your organization solve?
- Core business activities: How do you solve this problem?
- Target audience: Who benefits from your work?
- Unique value proposition: What sets you apart from competitors?

EXERCISE 1: REFLECTION

- **Clear purpose:** What problem does your organization solve?
- **Core business activities:** How do you solve this problem?
- **Target audience:** Who benefits from your work?
- **Unique value proposition:** What sets you apart from competitors?



PURPOSE:

CORE ACTIVITIES:

TARGET AUDIENCE:

VALUE PROPOSITION:

EXERCISE 2: ANALYZING EFFECTIVE MISSION STATEMENTS

Study the following examples and note what makes them effective:

- **Patagonia:** "We're in business to save our home planet."
- **TED:** "Spread ideas."
- **Nordstrom:** "To provide outstanding service every day, one customer at a time."

For each example, answer:

- What problem do these mission statements address?
- How do they inspire action?
- Why are they memorable?

EXERCISE 2: FIRST DRAFT

Using the components from Exercise 1, write a first draft of your mission statement:

VALUES

We also add our company values on the **Same Pager**.

Our values are not fluffy - they are how we hire, fire, reward, and promote. If you want to know what it looks like to win at our company, read our values and act in alignment with them.

1 DEFINITION AND ROLE:

- Guiding principles for the organization
- Influence company culture and decision-making

2 IDENTIFYING AND DEFINING COMPANY VALUES:

- Selecting core values that truly represent the company
- What has frustrated you lately? Think of the behavior and pick the positive of what you want.
- Think of your last few fires. Why were they fired, what value did they break?
- Importance of involving employees in the selection process
- Define values in actionable terms

3 IMPLEMENTING VALUES IN DAILY OPERATIONS:

- Incorporating values into performance evaluations
- Aligning rewards and recognition with values
- Using values in hiring and firing decisions

4 VALUES IN TEAM MEETINGS:

- Importance of leadership modeling values
- Example: Weekly team shout outs based on values

5 CREATING CLEAR EXPECTATIONS:

- Creating Clear Expectation Include value-based competencies in job descriptions
- Develop performance evaluation criteria that reflect company values
- Create value-specific goals for each role or department
- Implement a reward system that recognizes value-aligned behaviors
- Incorporate values into the onboarding process for new employees



1 MEASURING VALUE ALIGNMENT:

- Methods for assessing how well the company and individuals are living up to the stated values
 - Regular employee surveys on value perception and implementation
 - Analysis of customer feedback for value alignment
 - Conduct value audit sessions with teams or departments
- Strategies for course-correcting when there's misalignment
 - Provide targeted training on specific values that are underperforming
 - Implement mentoring programs pairing high-value aligners with those needing improvement
- Revise processes or policies that may be hindering value alignment
 - Address misalignments in one-on-one conversations with employees
 - Consider reorganizing teams to better support value-aligned work
 - Revisit and potentially revise values if they're consistently misaligned with business realities



Let's wrap up this chapter on the *Same Pager™*, mission statements, and company values. These aren't just fancy business terms – they're your secret weapons for success! The *Same Pager™* is like your business's North Star, guiding everyone in the same direction.

Your mission statement? It's the heart and soul of your company, inspiring your team to do great things. And those values? They're not just words on a wall – they're the rules of the game for how you play business.

By nailing these basics, you're setting yourself up for better communication, smarter decisions, and a team that's all in. So, roll up your sleeves and get started – your business will thank you!