



**Dianne Dawson, M.A.**  
Business Success Through Strategic Advantage

## It's Time for a Different Conversation - WORKSHEET

For each question presented below, a set of instructions is provided for answering it. Some also include additional information. Use the space to jot down your responses *or simply think through* how you would answer as you read.

- ◆ **Do I know how I got here? Have I made it repeatable (or can I make it repeatable) and can I “count on it” as a means for sustained or continued growth?**

Write down the factors that are the key to the success of your business. This should be short and describe the key success factors that got your business where it is today.

- ◆ **Do I like what I have built? Does it support my values and the vision I have for my life?**

Describe how your business supports your values and the vision you have for your life. Include the top three things that you like about what you have built.

- ◆ **What's on the horizon – or what do I want to be on the horizon – that's exciting for me as I move forward?**

Describe the opportunities that you have or that you would like to develop and pursue. What is it about these opportunities that make them exciting for you? How will pursuing them benefit your business? What will you gain from the experience of seeing them to fruition?

◆ **Am I thinking big enough?**

“Big” means different things to different people, and it can mean different things *to you* at different times. While some may choose to focus on “big” as in growing a bigger business or increasing your revenues in a big way, let’s set that aside for a moment and instead focus on you.

**Are you thinking big enough in terms of who you are becoming as the owner and leader of your business?**

Are you asking provocative questions? Are you making challenging decisions? Are you welcoming – and seeking out - good opportunities *even when they take you out of your comfort zone*?

Are you looking beyond next quarter - even better, beyond next year? Are you open to new ideas? Are you reaching out to meet new people inside and – perhaps even more importantly - outside of your industry? Are you thinking about how your business can have a bigger impact on your community...or on the world? Are you looking ahead with a fresh perspective?

In other words, are you expanding your thinking and stepping up in a big way? Use the space below to describe how you are expanding your thinking and to list the three opportunities that you have right now to step up in a bigger way.

◆ **Is there something about the way I am leading my business that I want to be different?**

You are the leader of your business. Being the leader is not dependent on whether or not you have employees. You must lead *yourself* first and foremost.

As you reflect on your answers to the previous questions, look more closely at how you have lead your business up to this point. Your business has been shaped by the decisions you have made and the actions you have taken - or not taken. Think deeply about this for a moment.

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**Dianne Dawson, M.A.**

Business Coach and Creator of Money Metrics™  
Money Metrics™, Profitability and Business Growth

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What do you want to be different about the way you will lead your business going forward?

Why do you want to make this change?

What impact will this have on your business?

What impact will this have on you?

What might hamper or stop this change from happening?

What can you do to prevent that from happening? What commitment will you make towards that end?

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◆ **Is it time to uplevel or expand my advisor team?**

Your advisor team members are the people on whom you call when you have questions in areas that require specialized expertise. Your team can be as small as two people, or larger to fit your needs. Think Business Coach, Attorney, CPA, Financial Planner, Investment Advisor, retired executive, industry experts, selected consultants, etc. based on your business and its needs.

Serving as your “think tank,” this should be a diverse, experienced and open-minded group with people who will be honest and forthcoming with information, feedback and questions. You tap into their expertise for advice, deep discussions on current issues and wisdom for thinking ahead. **Your team may be formal, such as an advisory board that meets regularly, or it could simply be the people with whom you meet or speak by phone individually as the need arises.**

However you access your team, it’s important that each member be the best fit for who you are becoming as the leader of your growing business and for the needs of your business as it stands today AND where you are taking your business tomorrow.

**Being well-versed in their area of expertise is expected. A strong advisor will also challenge your thinking, help you look ahead to issues that are coming down the pike, and they will bring provocative, penetrating and challenging questions to you in addition to answering the questions that you bring to them.**

They should also have experience working with businesses that have already achieved the level you are seeking so that they are well familiar with the issues, challenges and pitfalls at that level and can help to steer you around problems and towards a smoother passage to success.

What advisor roles do you need on your team?

For which roles on your team is it time to uplevel with a new person? What steps can you take to start identifying a stronger, more appropriate advisor to be on your team?

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- ◆ **Though it may be in the distant future, what do I need to be doing now to prepare and position the business for its ultimate transition?**

Whichever option you choose for transitioning out of your business, there are certain things you will need in place to make your business more attractive to the acquirer and to command a higher price.

Even if you are passing the business on to family members or structuring an employee buy-out, their ability to maintain and grow the business can be hampered if you don't have these things in place – *even if they plan to make changes.*

Many of these items are core components of a well run business and having them in place now will serve you and your business, such as up-to-date, accurate and audited financial records or a complete, clear and easy to use Operations Manual.

**List below the items you need to prepare, update or polish to make your business easier to run now and more attractive to sell later.**

Don't worry if the items that you include on your list seem too much to undertake and correct at this time. *The point is to identify what's needed.* You can then make an action plan to be implemented over time, even if that time span is several years.

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- ◆ **What's Next?** You've built a successful business and you are ready to take it further. But, **what if you are wrong about what creates revenue in your business?** *What could that mistake in thinking cost you as you select and implement strategies to take your business forward?*

**If your goal is to continue to build a sustainable business and to increase your revenue,** then you must know *exactly* **which action** in your business **triggers** the revenue in order to improve, strengthen and multiply that action to increase your revenue.

I call that action – *the one that triggers the revenue* - your Money Metric™.

Your Money Metric™ is the specific action in your business that triggers the revenue.

I recently had a conversation with a business owner who unwittingly had **just reduced** performing the action that was triggering the revenue in her business because *she had no idea the role that action was playing in her success.*

What I have discovered is that 9 out of 10 business owners do not know which specific action in their business is triggering their revenue. Because of this, what it really means is that they do not have clarity on the *nuances* of how their business *really* works. With that circumstance, it's not surprising when increasing revenue becomes a challenge.

From this you can probably guess that your Money Metric™ is not always the action that you may have expected. That's why it's so important to pinpoint the Money Metric™ in ***your*** business (it's unique to every business).

**You can get a more detailed overview on Money Metrics™** - plus more information - in the **free Money Metrics™ Overview**, available for download on the same page where you downloaded this worksheet:

[www.DianneDawson.com/docs/seven-questions.html](http://www.DianneDawson.com/docs/seven-questions.html)

*There is also a slide show on this page that gives a brief introduction to Money Metrics™*

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## About Dianne Dawson

"Working with Dianne, I fashioned out a plan which has succeeded in bringing in a gross revenue of \$500,000 at a 19% profit margin, with a planned acquisition of a \$1 million practice, which has a margin of 25%."

- J. Byas, California

"Working with you moved us from being a part-time hobby business to a first-page-of-Google, almost million dollar business. It could not have happened without you!"

~ S. Penney, Virginia

"She's a systems thinker and she isn't going to let you stray off the track."

~ E. Baldwin, Virginia

"I'm glad I'm working with Dianne, because I'm achieving the outcomes I want."

~ W. Hutchison, Australia



**Dianne Dawson, M.A.** works with forward-thinking entrepreneurs and business owners who have built a profitable business but who are not hitting the revenue targets that they want to reach.

Since 2000, Dianne Dawson has taught hundreds of entrepreneurs on how to start and grow a business. She now specializes in working with established service businesses and professionals in private practice. She developed the concept and process for **Money Metrics™** while working with self-employed professionals and small business owners who wanted to build a more profitable business.

Dawson has been quoted in Investor's Business Daily, The Eastern Shore News and other publications. She has also appeared on television and radio. Dawson has taught entrepreneurs how to start and grow a business via the NxtLevel® program through the Small Business Development Center.

She is an award-winning trainer with a focus on leadership, marketing and business development.

You can connect with Dianne Dawson on LinkedIn at:

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