

the SAVVY BUSINESS Roadmap

An easy step-by-step guide helping you create or grow a business with your smarts + your heart.

CHECKPOINT #1: THE HEART OF YOUR BUSINESS



Your heart is the beat of your business. Whether it is beating rapidly from excitement and happiness or overwhelm and exhaustion, you need this check-in. New in business? **Use this worksheet** to construct your mission, vision, core values and goals for your company. Not a newbie? We are about to find out if the mission, vision, values and goals that you first set out still align.

[DOWNLOAD NOW](#) ◆

CHECKPOINT #3: STREAMLINE WITH SYSTEMS



Workflows got you down? Or are you shouting “What the heck are workflows?” and feeling like you are spinning in a vicious cycle of chaos? **Download my tips** for getting your business in order.

[DOWNLOAD NOW](#) ◆

CHECKPOINT #5: PROMOTE YOUR OFFERING



Feel like you are doing everything, but no one is listening? Launch a service or product and then hear crickets? Girlfriend, let's change that immediately with **this download** all about how to promote your offering and have everyone hittin' that BUY NOW button!

[DOWNLOAD NOW](#) ◆



SAVVY START

You may have some twists and turns along the way, but I've got your back and am here to guide you. I am sharing my six checkpoints which will allow you to stop, take a breather and assess your biz right away. Whether you are a new entrepreneurial gal or already rockin' and rollin' in business, this journey will help keep your biz and yourself on the road to success!



CHECKPOINT #2: PRESENT YOUR BRAND

Are you presenting your brand in its best light? Do your visuals, copy and overall voice of your brand represent the vision of your business? **This checklist** will help you make sure your brand screams YOU, sista friend.

◆ [DOWNLOAD NOW](#)



CHECKPOINT #4: KNOW YOUR MONEY

You are screaming in your head “Show Me The Money”, right? I've got you boo! **Here are my tips** for creating a PROFITABLE business. Yes, let's talk pricing, budgeting and all things dolla, dolla bills y'all!

◆ [DOWNLOAD NOW](#)



CHECKPOINT #6: BUILD YOUR DREAM TEAM

Ready to build your dreamy team, don't know where to start? Let me show you in **this worksheet** how to grow your team + scale your business together.

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THIS IS NOT THE END, ONLY THE BEGINNING

New here? **Get to know us in the free FB group**
Ready to uplevel? **Join us in The Savvy Community.**



CHECKPOINT #3:

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TAKE ACTION RIGHT NOW!

Take inventory of all of the tasks you or someone else does in your business.
Document all of the tasks.
Categorize the tasks: Daily, Weekly, Monthly, Semi-Annually or Annually
Decide whether to automate, delegate or batch.

Here is a list to get you started:

DAILY

Determine Top 3 Things You Are Going to Accomplish
Answering Emails
Update Projects
Client Calls
Social Media

WEEKLY

Schedule Social Media

- ◆ Facebook
- ◆ Twitter
- ◆ Pinterest
- ◆ Instagram

Write Newsletter
Write + Schedule Blog Post
Invoice Clients
Schedule Appointments
Consultations with Clients
Package Client Gifts
Ship Items or Gifts
Update Client Files
Check-in with Team
Update Contacts or CRM
Answer Client Emails
Moderate Blog Comments

Manage Deadlines
Respond to Comments on Social Media
Design
Follow-up with Other Professionals
Filtering Emails / Managing Spam

MONTHLY

Update Bookkeeping
Design Graphics
◆ Blog
◆ Newsletter
◆ Social Media
Brainstorm Marketing Ideas
Update Editorial Calendar
Payroll
Team Meeting
Restock Supplies
Send cards
Arrange Travel
Review Google Analytics
Organize Dropbox or Google Drive
Create Keynote Presentations
Create Spreadsheets
Review FB Insights
Guest Blogging
Work on SEO
Update Plugins
Print/Review Profit + Loss Statement + Balance Sheet
Produce Videos for Service or Product
PR
Creating and Scheduling Broadcast Emails to Promote Content
Landing Page Setup

SEMI-ANNUALLY

Review Website Copy
Update Website Graphics
Create/Update Company Templates
Review Systems
Determine Advertising
Business Spring Cleaning
Technology Upgrades

ANNUALLY

End of Year Review
File Taxes
Team Retreat
Review Systems

Review/Update Agreements
Review Marketing Campaign
Review Marketing Collateral

MISCELLANEOUS

Creating a New List in Email Marketing Software
Adding and Removing Subscribers from Lists
Pay Quarterly Taxes for Estimated Payments
Interview Candidates
Hire Employee
Employee Reviews