

Releasing Kings Coaching Overview

“If it’s not in writing, it’s not yours”

"Write the vision And make it plain... That he may run who reads it. Hab 2:2 NKJV

1. Purpose and Vision – Write down your life purpose. Why are you here? What is the activity that reflects the deepest desires of your heart, your core character values, the area of your personal passion, and your talents, skills and abilities? Why does God want to prosper you? Write it down in a paragraph.

[From Pew to Purpose](#) and [Stewards of Glory](#)

2. Goals – With your life’s purpose in mind, what are your goals for the major areas of your life (God, family, vocation / ministry, finances, health, and play)? Write them down in the past tense.

[Goals that Overflow](#) and [Hearing Hearts](#)

3. Heart Boundaries – Most of us have boundaries in our hearts that represent vows from our past which have cemented into ceilings for our future. Changing the beliefs in our hearts about our own identity and potential is a key step of inner healing before we can go to the next level.

[From Poland with Love](#) and [Go There](#)

4. Affirmations – If we set some lofty goal associated with our life purpose, our mind immediately starts coming up with a list of reasons why it won’t work. If we simply phrase our “affirmations” as questions, we can then meditate on the reasons “why” those things will come to pass. These “affirmations” give our mind a constructive job that builds us up and gives our heart the answer it seeks regarding “why.”

[Affirmations](#)

5. Team – People who are successful in life are very careful to surround themselves with the help they need. They find those with a similar heart’s desire but different strengths, and work with them to multiply the effect of their mutual dream. It’s a powerful dynamic, both spiritually and practically.

[Encouraging one Another](#), [Teamwork to Make Your Dream Work](#) and [Heirs Together](#)

6. Cash flow – Putting our finances into a monthly cash flow format is an essential part of integrating our life’s plan with reality. Whether its personal finances or business finances doesn’t matter. We are stewards of the destiny God has given us, and we all have to navigate the real world of making money and converting some of it to ministry. Creating wealth is a spiritual discipline.

[How Cash Flows](#) and Your [Spiritual Wealth Thermostat](#)

7. Schedule – Most of our goals should translate to specific activities that can be put on a schedule with an end date. Planning your next months of achievements goes a long way toward making your life’s purpose real.

[Time Management](#)

8. A Business Plan – If you treat the stewardship of your life like talents God has given you, making a written plan is an important step toward getting your dream off the ground. Writing things down is also a key ingredient in moving your heart’s desires into a real life destiny.

[Write Your Business Plan](#)

1.0 What's my Life Purpose?

Your dream begins when you give yourself permission to dream. I have to embrace the theological position that God has written His will into the desires of my heart. Not there? Many believe our hearts are evil, and get trapped in religion: "I'm obeying the will of God for my life and I'm living above my carnal desires." That attitude is good for new believers, but over a lifetime, it will eventually shipwreck - I've tried it and so have you. Religion is fulfilling the expectations of others; Christianity is operating out of your own hearts desires. One is death, the other is life.

One of the early signs that God is unveiling your heart's desire is that you see someone else "modeling" your dream... you'll be drawn to emulate that person. When you see others with a calling, gifting, and anointing similar to your own, you naturally will gravitate toward them. You'll experience a healthy envy that draws you into their anointing. They are examples the Lord is showing you to pull you into your own destiny. Let your envy work its way into mentoring. We are drawn into their anointing and purpose. Godly mentors don't focus on accountability; they focus on making you a success and letting you hold yourself accountable to something that works.

The Kingdom is being built by people who are having fun, prospering in every way, and sharing from a cup that runs over in abundance. If you're struggling in this area, my first suggestion is to read [Releasing Kings](#). It was designed to provide a very Biblical basis for this move in our hearts.

Many believers carry an attitude that it would be immodest to receive power, riches, wisdom, strength, honor, glory and blessing. The reality is that if our work in the marketplace is anointed and it blesses or ministers to people, we will receive glory from men and God. It's part of God's plan to make our names great, as evidenced in the life of Solomon.

God has created us for good works: starting great businesses that bless our city, creating great art that touches hearts, governing with liberty and freedom for all. Those successes draw people to us and ultimately to our Lord. That's how the Kingdom is built in the marketplace! Both God and all of creation are waiting for glory to be revealed in you and me through our work.

Here's my real point – This process isn't magic. The desire in your heart isn't just your own invention, it's your calling. It was put there by God to lead you to a specific mountain and vocation where you will find the expressions of excellence that fully utilize your unique skills, talents, and personality. That's when you will stand out and receive glory.

Summary – Everything on earth glorifies God when it's fully developed, including you. If you hide your glory, you are robbing God of His glory. Allow yourself to be appreciated, celebrated, and seen. You are God's creation; you carry the Spirit of Jesus. Being who you are and fulfilling your dream is exactly enough.

"Lord, beginning today, I will no longer be invisible. I will no longer hide behind a cause or a need or another person. I'm giving my heart permission to dream and hope. I'm going to step out in front because I have my own theater (metron) where I'm the main actor and I am living a beautiful and adventurous script. I know that I'm called and empowered to be the hero and the star in the land that God has given me. I will allow my name to be made great so that I, too, can bring glory to God."

1.0 My Life Purpose

1. Write at the top, "What is my life's purpose?"
2. What's the real desire of your heart?
3. What makes you, or would make you, happy?
4. Write the answers that pop into your head in a short phrase.
5. Repeat step 4 until you have an answer that makes you cry. This is your purpose.

My heart's desire

- 1.
- 2.
- 3.

My top passions

- 1.
- 2.
- 3.

My top values

- 1.
- 2.
- 3.

My best talents, skills or abilities

- 1.
- 2.
- 3.

My weak areas that need the gifts of others

- 1.
- 2.
- 3.

Summary Statement

Summarize your talents, values, passion. What's your heart's desire? Explain how it all overlaps with God's plan to build the Kingdom.

Now expand that thought into a statement of your life's purpose (change it as often as you like).

You can take a DISC and values inventory for free at:

DISC - <http://my3.innermetrix.com/vo/req.php?id=ac6a998d>

Values - <http://my3.innermetrix.com/vo/req.php?id=d8b3dbde>

The minute you finish you'll get the results in an email from customerservice@innermetrix.com. I can review it with you or you can get an explanation of the results <http://whatsyourgenius.com/genius-mindset/posts/your-natural-talents.html>. I recommend reading [*What's Your Genius?*](#) By Jay Niblick.

Keep in mind this won't define your heart's desires. The additional key is finding the overlap between what's in your heart and what's in God's heart.

2.0 Goals That Overflow

Fish or fisherman – We all have desires and aspirations. Some of us even have goals written down. Why is it that some people seem to have an ability to create wealth and others don't? There is even a political movement that concludes that this scenario is unfair, and that wealth should be "redistributed." I want to suggest that it is much more benevolent to teach people how to move from poverty to wealth; giving to the poor is Biblical and appropriate in some circumstances, but it reinforces poverty and is never a long-term solution. Continuing to give wealth to the poor without teaching them to multiply money themselves is the modern equivalent to slavery. It keeps people in bondage. This newsletter is simply about one aspect of the Gospel... the good news of how and why you can turn poverty into prosperity.

What if? – It's OK to have a focus on meeting your personal needs and those of your family. Imagine the bills are all paid, your wish list for house, car, hobbies and business are fully funded, and your personal needs for the rest of your life are covered. Now imagine more money comes; first an extra \$100k comes. What would you do? Think about it. Now imagine an extra \$500K comes in... What would you do?... now \$1M. What would you do?... now \$5M. What would you do? Now \$10M... What would you do with money if it no longer had value to you personally?

The good news - At some point all our needs are met and we run out of ideas on how to get rid of the money. That's where the Kingdom comes in. Here's the secret (really, it's the gospel): wealthy people always have a purpose for wealth that is bigger than their personal needs. It's "poverty" that is focused inward in a selfish way. If we can't honestly come up with any reason for wealth beyond our personal needs, our hearts will naturally sabotage our attempts to multiply finances.

The nature of poverty is that its inward focus is self-defeating. The nature of a prosperous business is simply to find a need in someone else's life and fill it. Can you see that successful business and ministry are the same thing? It is only our cultural bias that separates them (dualism). Opportunities for spiritual ministry and financial increase are found together when that wall comes down.

Hearts – Why does this work? Your heart was designed by God to bless others; to bless the nations, in fact. If that dynamic is missing, then your heart is really working against the goals you may set in your mind. It doesn't mean your personal needs go wanting. It means your cup was designed to continually overflow so that your personal needs are never part of the equation. You live continually in a place where your anointing and your finances are far beyond your own needs... "Immeasurably more"... "a river of delights." Ps 36:8-9

Get Started - Write your goals down for the next year and carry them with you. Put them in the past tense as though they had already been achieved. Read them to yourself out loud several times a day. The generosity and Kingdom orientation we've discussed in this newsletter do open a door in the Spirit for your blessing. But, it's not magic! Your initiative is still required to work, start the business, or make the investment. Your efforts will be blessed.

Recommended Reading – [Living On The Third River](#) by Craig Hill describes the principles in this newsletter. Special thanks to [Dan Gaub](#) for sharing these concepts in his seminar.

2.0 Pocket Goals “Worksheet”

That I review daily (past tense) to express my life’s purpose

“Smart” goals are:

Simple – specific, significant, stretching, scheduled

Measureable – meaningful, motivational

Attainable – agreed upon, achievable, acceptable, action-oriented, accountable

Realistic – relevant, reasonable, rewarding, results-oriented

Timely – Time-based, tangible, trackable

1. Decide exactly what you want in each area of your life. Be specific!
2. Write it down, clearly and in detail;
3. Set a specific deadline. If it is a large goal, break it down into sub-deadlines and write them down in order;
4. Make a list of everything you can think of that you are going to have to do to achieve your goal. As you think of new items, add them to your list;
5. Organize the items on your list into a plan by placing them in the proper sequence and priority Link your goals with your schedule;
6. Take action immediately on the most important thing you can do on your plan. This is very important!
7. Do something every day that moves you toward the attainment of one or more of your important goals.
8. Change your goals as often as necessary to stay current with your dream.

Dream Category

1. God

2. Spouse / family

3. Vocation / Ministry

4. Finance

5. Health

6. Play

3.0 Heart Boundaries

Our hearts are like thermostats that have led us, and keep us, in exactly our current station of life. We may think we can change by changing our minds or attitude, but 90% of what we do comes right out of our hearts or subconscious and is very resistant to change. We have all seen examples of people doing great things, whose minds and hearts seem aligned in a way that facilitates excellence with ease. Einstein, Edison, Michael Jordan, Bill Gates and Warren Buffett come to mind. Their lives seem to flow, while ours seem to struggle and require a lot of effort.

The reality is that all of us were created by God to achieve a remarkable measure of greatness in the area of our calling. Getting there (“I will make your name great” Gen 12:3) and enjoying the process (walking in the Spirit) is the challenge of getting our hearts and minds on the same page so that we don’t sabotage our own efforts from being double-minded and unstable (James 1:6-8). Life starts to work when the intention of our minds, the direction of our heart / subconscious, and the mind of God’s Spirit are all pointed in the same direction. We discussed this process in [Created for Success](#), [How Change Happens](#) and [Disciples with Heart](#).

Where am I now? – Well, to be honest, most of us are stuck at the current level of our hearts. Taking my business or my personal life or my marriage or my investments to the next level requires a heart change that I don’t know how to navigate. We have all been through some negative circumstances or relationships that have been wounding. Typically we make a vow never to let that happen again. The boundary represented by that vow is the ceiling that holds us back from the next level. In other words, our hearts have a very good reason not to let us succeed or change. The boundaries guarded by our hearts are intended to protect us, but they also imprison us.

Healing our hearts – Our hearts will let go of the safety of the “old” for the risk of the “new” but we have to have a good reason. We let go of our brokenness and forgive when we really understand that we can “trade up” for our destiny and break out of the cycle of being stuck at our current level. The concept of inner healing used to be just about letting go and forgiveness. Now we understand that our hearts need to be lovingly invited into our Kingdom destiny. That’s a good reason to let go of the status quo and take the risk of change.

Change as a lifestyle – Even though we’re admitting that change is difficult, our lives periodically do face changes, and the Spirit of God is always moving. We have been created by God for success, but life has programmed our hearts with limitations and failure. We need the software in our hearts updated to the latest release. Finding the new reasons for our hearts to update and let go of the old reasons for safety is a reality of walking with God and receiving our inheritance. We all have cycles from our past where we go around the mountain, the Lord offers us change and promotion, our hearts say, “no thanks” and we take another lap around the mountain until our next offer. It’s time to learn how to say “yes Lord,” make the change in our hearts, and receive the good things God has for us.

Specifics – I use a [heart exercise](#) to sit quietly before the Lord and think about what I want to change, how the failure cycles feel, and discern the heart attitude behind it all. I write it all down in longhand as it comes. Then I write down the new actions, feelings and heart attitudes that I’m adopting. The process can be done individually or in a counseling format. A good counselor with a little prophetic instinct can help us discern our hearts. One insightful comment was, “When you pointed out when things came out of my mind and when they came out of my heart, I could see the difference.” Although I’m neither a pastor nor a counselor, I love people and helped several through this process in Poland, seeing some amazing changes. I’ve also seen it work in my own life to the degree that other people can easily see the difference in me and the difference in my ability to connect with others at a heart level.

Recommended Reading: [*Wired for Success; Programmed for Failure*](#) by James B Richards

Video series [*Creating Wealth*](#) by James B Richards

4.0 Affirmations

When you set goals or use affirmations, have you noticed a little voice that pops up? “I’m going to add a video newsletter.” The little voice says, “Are you kidding? People will laugh!” You know the routine. The little voice keeps us from making goals, or mocks us when don’t attain them. That’s the job of our mind – to hold us accountable. We need to give our minds a positive job that will contribute to the process instead of detract from our goals or affirmations.

Affirmations – I read “[The Secret Code of Success](#)” by Noah St. John. Although a lot of the success literature carries a New Age philosophy, Noah is a Christian targeting a secular audience with a Biblical message. You should recognize that as evangelism! “Affirmations” is the word he uses to describe the process of stating your affirmations as questions. (I recommend the book).

For example, if my goal was to learn to create wealth, my affirmation might be, “I am creating wealth by adding value to the lives of others.” And, the little voice would say, “Then why are you so broke?” And, “Why did your last investment fail?” And, “It seems like nothing you’ve ever tried has worked.” ... you get the idea. Let’s stop the little voice before he takes over the newsletter.

Noah suggests – “Affirmations” are simply framing the goal or affirmation as a question, “Why am I creating wealth and adding value to the lives of others?” That does two things. The question sends your mind off to search for answers in wisdom, and starts the creative process. Secondly, it engages your spirit to seek the guidance or revelation from the Holy Spirit to see if God has any input. He often does. Writing down your goals in terms of “affirmations” is great devotional exercise that will make a difference in your outlook and level of creativity. Thank you, Noah! The answers come back with the justification of “why” and practical aspects of “how.”

Permission – Now my mind is continually working with me instead of sabotaging my heart’s desires. I’m intellectually searching for wisdom every time I consider these questions. My spirit is continually listening for God to speak to me in this area. I can show my list of goals / affirmations to others and get their feedback and wisdom. Pretty amazing, isn’t it? Now my heart is bold at pursuing my destiny because I have the reasons why. I know why those goals are part of God’s plan and I know what to do to achieve them. My words and my actions courageously reflect my life’s purpose in a prophetic, creative way. Dreams do come true. That’s how the Kingdom is built.

4.0 Affirmations Worksheet

Finding your “because” and gaining permission to succeed

Example – replace these with your own affirmations written as questions and the reasons why they are true. Here are a couple of examples.

Why do wealth, opportunities and divine appointments come to me routinely?

- a. God is teaching me to create wealth through mentors and divine appointments
- b. I’m a Kingly example of this aspect of discipleship – creating wealth is part of the gospel
- c. I’m watching for good opportunities; working with people who already “create wealth”
- d. I add value to the lives of others: spiritually, emotionally, and financially

Why am I able to add value to others: spiritually, emotionally and financially?

- a. I can connect them with Jesus and the dream associated with their destiny
- b. I can connect them with their own hearts (Kingdom purpose, God’s heart)
- c. I can connect them with an opportunity to network: resources, info, people and investments
- d. I can release their hearts from religion to the Kingdom

1. Why do I carry God’s favor?

- a.
- b.
- c.
- d.

2. Why does my spouse love me so much?

- a.
- b.
- c.
- d.

3. Why do wealth, opportunities and divine appointments flow toward me?

- a.
- b.
- c.
- d.

4. Why is my work so rewarding?

a.

b.

c.

d.

Recommended Reading – [The Secret Code of Success](#) by Noah St. John

5.0 Who is on My Team?

Dreams with a chance to succeed have two ingredients: a plan to create wealth and the necessary help to implement them. People in poverty tend to miss both the money and the support system. They tend to think in terms of working alone. Wealthy people navigate the money issues and have an extensive support system in the people around them. They freely admit their weak areas, and instead of changing themselves, they just find other people to fill the gaps so they can remain authentically the way God made them. You can be a genius too, if you recognize both your strengths and weaknesses.

A Team – People who are successful in life are very careful to surround themselves with the help they need. They find those with a similar heart's desire and work with them to multiply the effect of their mutual dream. It's a powerful dynamic, both spiritually and practically.

*And when the day of Pentecost was fully come, they were all **with one accord** in one place. Acts 2:1 (see also Acts 1:14, 2:46, 4:24, 5:12, 8:6, 15:25, Rom 15:6)*

In the Greek, *homothumadon* is translated "with one accord," meaning *unanimous in passion*. When we find people with a passion in their hearts that matches our own, it feels like we found a family member. There is chemistry: a relational bond that easily forms. Our mutual dream is greatly encouraged. There is something about "working together" on a shared goal that is pure joy.

Finding your team – How do I find those kindred spirits that overlap in my own heart's desire? It's a great question and holds a key that will unlock your dream. Here are a few examples of the roles they can play.

Friends – When our dream is young, the support with which we start is the encouragement of our friends and spouse. Never underestimate the power of encouragement. The greatest gift you can give a friend or your husband or wife is permission to pursue their dream. Imparting the prophetic sense that the Father is granting that permission is even more powerful.

Mentors – A coach can help you find your "what" and "why." Mentors are those who have done it before, themselves, and can show you "how." They strike a chord deep inside and we long to emulate their heart and their work. These services are so valuable that business people often pay for them as consultants. You may enjoy several past newsletters: [Relational Mentoring](#), [From Spiritual Covering to Practical Mentoring](#), and [A Case For Mentors](#).

Board members – All of us have weaknesses. A board can be a group of people with strengths that we don't have. So when we pick them, we are looking for these missing pieces who can give us better ideas about implementing our vision.

Partners and Affiliates – Partners or affiliates are people who have enough synergism with your dream that they can naturally fill a role in making it happen. In some cases they may support you with their time and talents. In other cases they may be investors in your vision.

Staff – Every successful company soon reaches a size when it becomes cost effective to hire like-minded people who share the vision, and multiply its vision for a salary. We can increase the staff's sense of sharing the dream with tangible concepts like stock ownership and employee ownership or with the intangible benefits of owning or sharing the vision.

Customers – Every dream needs beneficiaries. These might be the most important people because they are willing to "buy" the product or service that our dream provides in order to facilitate their dream. Here's an important aspect of "my" dream: it has to bless people and make their dream come true.

6.0 Cash Flow Primer

Cash flow is an accounting term that is simply a monthly summary of income and expenses – usually done on an EXCEL spreadsheet. Both business and personal finances can be tracked with cash flow. This tool can be used to track the prior 12-36 months of income and expenses and to project 12-24 months into the future. Cash flow can (and should) be used to track both personal and business income and expenses, and is required to obtain a loan. It helps reduce financial surprises!

Cash flow is more important than profit; businesses fail and individuals go bankrupt because they run out of cash and simply can't pay the bills. Cash flow is a budgeting tool that can be used to remind us of annual expenses and seasonal fluctuations in expenses and income. For example, taxes are due once a year; insurance twice a year. Income may be the same every month if you have a job. However, if you work on a commission or in a seasonal industry, like agriculture or tourism, your income may vary from month to month. The example below is my personal budget in a cash flow format showing the categories of income and expenses that I update on a monthly basis.

The worksheet for cash flow in excel is built into our [EXCEL Cash Flow Template](#) which includes personal and business templates.

You may also enjoy this [Cash Flow Primer](#) and these two newsletters which expand the cash flow theme.

<http://releasingkings.com/2010-05-30how-cash-flows/>

<http://releasingkings.com/2010-06-07-cash-flow/>

6. Cash Flow

Recommended reading

<http://releasingkings.com/2010-05-30how-cash-flows/>

<http://releasingkings.com/2010-06-07-cash-flow/>

	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
Present Monthly Cash Flow (= Inc - Exp)	0	0	0	0	0	0
Cash on Hand (end of previous month)	0	0	0	0	0	0

CASH RECEIPTS						
Job income						
Business income						
Investment income						
TOTAL CASH RECEIPTS	0	0	0	0	0	0
Total Cash Available (before cash out)	0	0	0	0	0	0

CASH PAID OUT						
Debt #1						
Debt #2						
Debt #3						
Auto payment, insurance, fuel, repairs						
Rent or house payment						
Health insurance						
Eating out						
Groceries and Sundries						
Phone						
Electricity						
Income tax						
Legal / accounting						
Giving						
Investing						
Vacation / Travel / Misc						
SUBTOTAL	0	0	0	0	0	0

7.0 Time Management and Schedule

Time management is a misnomer. We all have the same amount and none of us can speed it up or slow it down. The essence of the concept is “life management.” Do I know my direction and am I working on it? Can I write it down? It works better to have a purpose and a list of priorities than a plan... you and I should have both.

I do not run like a man running aimlessly... 1 Cor 9:26 NIV

We have some great suggestions in [Desire to Destiny](#) written around that same theme. Once I know my purpose, it's much easier to write goals for this year, this month, this week and today. Without knowing our purpose, it's nearly impossible to get a goal on paper, much less stick to it with a schedule.

Balance your heart – Your heart needs some time in each of the following four areas. We do spend most of our time working (typically 40 hours a week). However, budgeting time for play, nature and God, keeps our hearts vital, healthy, intuitive and creative.

1. **Productive time** is working on the desires of your heart. Ideally, this should be our vocation and it should create wealth. God designed us to work on our dream and fulfill our purpose for being here. Working on our heart's desire feeds our soul. In fact, “seeking the Kingdom first” means that I understand the desires God put in my heart and I am pursuing those desires (Mt 6:33).
2. **Play time** is simply re-learning to be child-like: having fun and laughing. It can be entertainment, movies, art, a hobby, fellowship with friends, sports, sex with your spouse... you just have to enjoy it.
3. **Nature time** is getting outdoors and enjoying God's creation. Going for a walk, exploring, enjoying animals and scenery are great ways to recalibrate.
4. **Spiritual and Intuitive** time is simply time in the presence of God. This can be your devotional prayer, worship, church, meditation, etc. It's the time I set aside to hear God's voice, experience His presence, praise His name, and talk to Him. It's your well spring for prophetic creativity.

Managing your time implies keeping a “to do” list for today, the week and the month. Your list is simply the activities that help you reach your goal. I've found it helpful to list the daily activities for the week on one sheet of paper. Having a schedule for those time frames is helpful as well.

The work sheet for a schedule is built into our [EXCEL Coaching Module](#).

8.0 A Business Plan

The first step is to have the conversation with God about what your dream is. The second is finding the wisdom and mentoring to make it happen. Think about your dream in terms of the outline of a business plan below.

Christians are a little prone to getting a revelation for an idea and not using wisdom to implement it, starting before they have the right mentoring and planning. The four most important things to think about:

1. Is your spouse on board?
2. Do you have experienced mentoring?... documented in a business plan
3. Do you understand the cash flow?
4. Are your personal finances covered while you start the business?

Business plans are normally written for banks or investors, to obtain start-up or operating capital. We should also use them to facilitate adding the details to our dream. Getting a good idea is just a beginning. We need to add the details to make our dream come true. Cash flow in EXCEL is one of your primary tools. Prove to yourself that your idea is profitable before your start. Prove to your spouse that starting a business is worth the time and effort.

- 1.0 **Vision and Mission** – Connect the theme among the desire of your heart, God’s direction, and the nature of your business in a few paragraphs. Why is it “compelling”?
- 2.0 **General Company Description** – Nature of business, goals, schedule, philosophy, description of industry. Factors that will make your company succeed. Describe legal form of ownership.
- 3.0 **Products and Services** - Describe in depth your products or services (technical specifications, drawings, photos, sales brochures, and other bulky items belong in *Appendices*). What factors will give you competitive advantages or disadvantages? Examples include level of quality or unique or proprietary features. What are the pricing, fee, or leasing structures of your products or services?
- 4.0 **Marketing Plan** – 1) Describe market research you have done that demonstrates buyers will want what you sell. 2) Describe strategies to promote, advertise, sell, and distribute your product. Why is your product better than the competition? Consider a marketing consultant for your market niche.
- 5.0 **Operating Plan** – Where will your product be produced, cost of facility, quality control, inventory storage, suppliers required. Describe all legal and environmental requirements (zoning, permits, licensing, insurance, trademarks, patents, etc.) Describe staff, number of employees, training required, pay structure. Who are the people that will help you make the business a success.
- 6.0 **Management and Organization** – Who provides leadership in every area? Organizational chart, board of directors, attorney, accountant, banker, consultants, and key advisors. Resumes of key people. Show how you will manage the business with cash flow. Find a mentor with specific experience in your niche and a start-up sequence coach for the launch phase.
- 7.0 **Financials** – 1) Show your personal financial statement (assets, liabilities and cash flow). Demonstrate that your personal expenses are covered if you need to quit a job to start the business. 2) For the company, list start-up expenses, source and amount of start-up capital, and provide detailed cash flow by month for 3 years that clearly shows start-up costs, monthly cash flow and point of breaking even. Describe ramp-up and schedule. Show how you will use cash flow as a

management tool for alternatives for different scenarios. Talk to various possible outcomes... growth, delays, etc. and show ramification with cash flow on break even date and profitability.