

A photograph of a desk setup. In the foreground, a silver laptop is closed. To its right is a small potted succulent plant. In the background, a white desk lamp is positioned on the desk, and a window with a view of greenery is visible. The scene is lit with soft, natural light.

# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

What to do, when, and how to do it

SMALL BUSINESS ACADEMY

# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

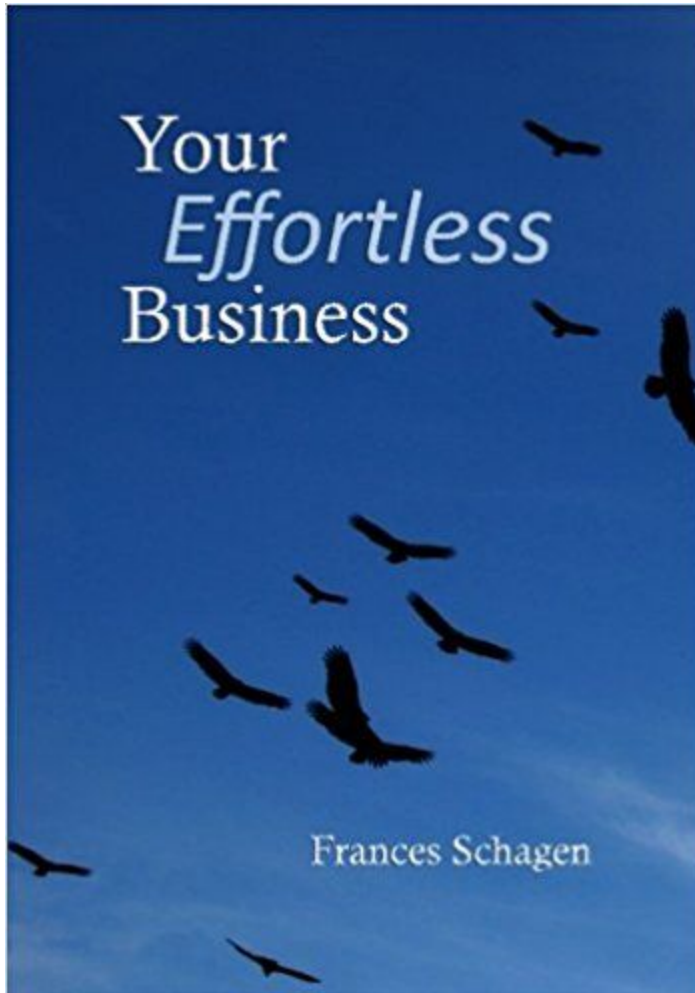
You know business is a struggle. Everyone tells you it is.  
The failure rate is 90%. Ninety percent!

How can that be okay? I didn't think it should be and I knew it didn't have to be, because I had clients who were running effortless businesses. I dug deep to find out the difference between business owners who were thriving, ones who were struggling, those who failed and the many who were doing okay, but not thriving.

I found some very surprising things that sent me down a 6 year-long journey to figure it out and more importantly figure out how you could get your effortless business too.

## **Let's define Your Effortless Business**

Have you ever watched large birds riding thermals? You would call that effortless, right?



But they had to get themselves there. They have to hold their wings out and steady. They have to read the wind and thermals to know where to go next. They do the work to get there then they leverage their efforts to make soaring easier.

It's why this is the cover of my book.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

Building your business can feel overwhelming. And lonely. Even once your business is up and running, you aren't done. Most business owners stop building their business when they get customers. They never finally get 'there'. You know that place where your business is humming along attracting great customers who are happily working with your engaged, amazing team. There where you can take hours off every day, days off every week and/or months off every year. And still make a great profit.

I know, I've started 15 businesses. Some lasted months, some years and one 15 years. One was incorporated, some were registered sole proprietorships, a couple were registered partnerships and many were just run under my name. All were legal and appropriate for what I was doing.

I have helped 1000s of people start small businesses in every industry, of every type and growing to every size. I have done this informally for friends, through my bookkeeping business and in partnership with small business support organizations.

I have helped with legalities, structure and accounting. I have helped with product/service design, offers and business models, I have helped with marketing and sales. I have helped with business strategy, process and procedures. I have worked with business owners at every stage from thinking about an idea to succession and inheritance. I have helped small business owners through business and life: marriage, children, divorce and death.

I have a deep and profound understanding of what a business can be and what the long term implications of every decision are. I know how your business can give you a great life or tear your life apart. People who have it 'made' didn't get there by accident. They did it by design and they worked hard to make their business support them in the life they chose.

You are told many things about starting a business. You are told that to start a business, you need a business plan. You are told that you need to register or incorporate a business to start. You are told to build your brand, get your website and marketing in place.

You need to know what you are building, why you are building it, who you serve and how to delight them.

Before drafting your plan, before raising money, before any marketing, you need to prove your idea by making sales.

Building a business is a confusing, overwhelming, scary, exciting, exhausting, profitable project.

Follow these 6 steps in order, complete each before moving to the next, and you will get through this faster and more easily.

You've got this.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## Owner's Journey

The itch to start a business begins with a problem.

It could be a problem with the way you are living your life. You want more time or money; you want more meaning; or you want to spread your wings and grow.

It could be a problem you encounter. You wish there were a better way to eat healthy, get work done faster, have more fun, in short, to solve a problem.

Your first job is to become very clear on WHY you are doing this.

Yes, you are compelled to solve this problem, but if you aren't clear on what you want to get out of this exercise, you will be perpetually dissatisfied. You will fall into a way of doing it without setting it up to work the way you do and give you what you need. I've seen night owls doomed to open their doors at 7am. I've seen extroverts stuck behind closed doors. I've seen introverts forced to make small talk with people all day.

Your business will become whatever you make of it. You make your business for you; you make your offer for your customers

Too many small business owners focus on the problem they are solving and their customers. They build what they think will work and charge a low price because that's all they think anyone can pay.

They end up building a business that doesn't serve anyone. That mindset keeps you struggling to build a relevant solution for your customers and keeps you perpetually behind financially.

### IN THIS STAGE YOU NEED TO:

Get clarity around your minimum viable wage, the maximum time (and the timing) you want to put into your business and about what is important for you. For instance, to me that means fun, learning and travel. My business must give me those and it does.

Understand your purpose for your company. That includes the problem you are solving and the people you serve. Understand why you have chosen this particular way of solving the problem.

### THIS IS IMPORTANT BECAUSE:

As you do the Discovery Dance between your needs and your customer's needs, you want to hold your needs as a constant. Your needs can and should be the *tune* that leads the dance.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## Discovery Dance

The first stage is all about figuring out what you want your business to be. Sure, I know you want to do a cafe/auto repair/accounting/life coaching. But there is so much scope in those. Think about different cafes you have been in and how different they can be.

By the time you are done this stage you need to know :

- What do I want out of this?
- Who are my customers?
- What do they want?
- What do they need?
- How can I solve their problem?
- What is my offer?

The only one you can solve on your own is the first one: what do you want out of this? This will remain constant as you figure out the rest. The rest is a dance.

Starting a business is a series of experiments, of small projects, of gathering data and feeding it back into your next experiment/project/data collection.

You will start with a broad idea then narrow it down and narrow it down until you answer those 5 questions.

By the end of this phase you will have sold enough to be clear on who, what problem you are solving, how and what your offer is. You heard that right, the best way to gather this information is to sell into your market. Not spend your time at your computer doing 'market research' and making up customer avatars.

You can't even begin your business plan (assuming you need one for funding) until you have this information. Your funders will be thrilled to see that you have already made sales and you will be in a much better position to negotiate. You may even find you don't need as much funding as you thought.

### IN THIS STAGE YOU NEED TO:

Get your first sales so you understand what your customers want and how you can serve them. You will know what offer resonates, what price works and what is important to your customers in your solution.

### THIS IS IMPORTANT BECAUSE:

Now you know you have a business that is worth putting your life into.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## Official Start

You don't have a business until you have sales, so don't waste time figuring out what legal structure, etc. you may need, until you have a business. You can legally run under your name (in Canada) as long as you report your income.

You may have enough proof of concept to begin investing in your business. That may trigger new legal and financial inputs. Take it slow. Add them when you need them, not just in case. When you add them, you can plan for much bigger. For instance, if you are buying software, make sure it can scale. Start with the beginner package and scale it as you grow.

If you need funding, this is the stage for that. Don't get caught up in making a detailed business plan just yet. You have proven your concept, but you don't know the scale of your business potential just yet.

You have already done the work of knowing what you want out of this, and that knowledge will inform how you grow and how big you grow. More detailed planning will come later after you complete startup mode.

For the first few customers you can take payments and keep track of everything manually, but as you go forward you want this work automated as much as possible so that you can focus on the next steps.

### IN THIS STAGE YOU NEED TO:

Choose a legal structure, set up your bank account and your accounting system. Check into regulations for your industry. You will think through your business model and the scale of the business you want to build. You will make a first pass at marketing materials. You don't have enough information yet to do branding. Your reputation is your brand. Focus on being authentically you

### THIS IS IMPORTANT BECAUSE:

Set this up and forget it. You will revisit this once your business has grown and and you know more about how it works. Now you want to focus on growing your business.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## Customer's Journey

At this point you have customers and a loose business structure.

Your job here is to serve and delight the customers you have. Work closely with each of them until they are happy and you are happy. Keep at it until you are clear on what it takes to solve their problem in a way that works for both of you. You may be spending more time on each customer to be truly profitable, but at this stage you are still learning. They call this 'doing what is unsustainable'

Once you can confidently bring in a new customer and efficiently serve & delight them, only then is it time to work on growing your customers.

Each of your customers takes a Journey through your business. First they are attracted because they have a problem and they see you may have the solution to that problem. The best way to attract new customers is to tell the stories of your best customer's success.

Next you engage your potential customers. What are their first interactions with you? How can you make that easier and smoother. Think about giving plenty of value here.

Then you are back to Serving & Delighting your new customers. Check in with them and tell their stories. Make it easy and encourage them to tell their stories, too.

### IN THIS STAGE YOU NEED TO:

Make it easy to attract, engage, then serve & delight your best customers. Everyone is happiest with a predictable journey and a little bit of surprise delight.

### THIS IS IMPORTANT BECAUSE:

Once you are clear about how you can serve your customers you can work on growing your team to help you do that.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## Team's Journey

When you are ready to bring in team members. They, too, take a Journey through your business.

Your team members want purpose, autonomy and mastery.

Your team members want to know that what they do matters, that they have the freedom to bring themselves to their work and they want to keep getting better.

If you want engaged team members, you must give them these 3 things. Yes, that can be scary, especially for small business owners used to doing it all ourselves, but in order to grow you must learn this part.

If your team members aren't giving you the results you want, this is a training issue. Spend more time and make sure they are super clear on what outcomes you want. Make sure they have the tools and know how to use them. Then step out of the way and let them do their job. Check in and give feedback if you aren't getting the outcomes you need.

Team members include, staff, contractors, suppliers, colleagues and anyone else that touches your business - paid by you or not. The more clear they are on the outcomes you want, the better they can help you get there.

At this point you have a well-functioning business, now it is time to make it automatic.

### IN THIS STAGE YOU NEED TO:

Design the predictable journey for your team so you attract and retain the very best.

### THIS IS IMPORTANT BECAUSE:

Your team do the work and they can't treat your customers better than you treat them. Once you have a reliable inflow of customers and a team doing the work, it's time to make it all automatic.





# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## Essential 11

Congratulations, you have a business that is growing and making money, but you aren't done yet. Many small business owners stop here and struggle forever more.

You look around at other businesses. You know you don't want to fall into the trap of believing their social media image, but you can't help thinking that they aren't working as hard as you, worrying as much as you or as unsatisfied as you.

You look at Sally who lost her corporate job a couple of years ago and began consulting. Every time you meet her, she's working on interesting projects, her podcast is gaining traction and she has been invited to speak at a couple of local events. You can see she has her act together and you wish you were more like Sally.

You look at Charles, who has steadily built his therapeutic massage practice over the years. His client list includes people you read about in the papers and he is selling a line of products. You can see he has his act together and you wish you were more like Charles.

You look at Maggie who started her coaching business a couple of years ago and is promoting a high-end retreat to Chang Mai. Her clients rave about her and she's all over social media with her amazing life style. You can see she has her act together and you wish you were more like Maggie.

I've worked with people like Sally, Charles and Maggie before they had their acts together. I helped Sally get off her networking and pay-for-hours-worked treadmill. I helped her carve out the time to start her podcast and helped her get it up and running. I helped Charles focus on providing an amazing customer experience and showed him how to help his clients share their story to attract even more of the best customers. I helped him realize that choosing to start a line of products and making it happen would help him reach his overall goals. Maggie and I worked together to put all her knowledge and experience into her programs and get amazing results for her clients. Her retreats are a natural extension of those results.

Making your business easier and more profitable isn't about finding the best systems and shoe-horning them into place. It's a systematic review of every aspect of your business.

Your next job is to make everything automatic;  
to take every aspect of your business and make it a process.

Much of this will be figured out, but maybe not documented. You will turn everything into a process that you and your team (and your customers) follow. This is what makes your business easier to run.

This isn't a quick process, in fact each of these algorithms can take months to complete. They get easier as you go along, as you learn how to do this and as you see what works for you. They can be done in any order. Do the easiest first to get some experience. Then do the one that is tripping you up the most; the one that will give you the biggest return.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## **Owners Journey**

This is the first thing you did. You know what you want to get out of your business. You should also have a pretty good idea about your exit strategy. Make sure you have this in front of you regularly.

## **Strategic Plan**

You have history, you have clarity and now you can make informed decisions about how to get to your next level.

## **Financial Management Plan**

Your financial management plan answers these questions:

How much money am I making?

What is my cash flow?

What is my budget?

Am I on track?

Your financial management plan includes the work required to give you these answers.

## **Customer Appreciation**

More customers leave because of feeling unappreciated than for any other reason. Bake this into your business. Make story gathering a part of this process.

## **Telling Customer Stories**

The stories of your best customers will attract more awesome customers just like them. How do you gather those stories, where do you tell them and how? Who is doing each of these pieces.

## **Customer Engagement**

How is it that you take a potential customer by the hand and introduce them to your business?

## **Team Appreciation**

Let your team know how important they are to you. Help them grow and be happy in their journey with your business. Gather their stories to tell.

## **Team Stories**

Make your business the kind of place the best people want to join. You let them know by telling their stories.

## **Team Engagement**

Culture is what makes your business. How you bring new team members on is important in building and sharing your culture.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## **Project Management**

Who is doing what, by when, how and what do they need in order to deliver the service that will delight you, your customers and your team.

## **Feedback Mechanisms**

Always be testing and learning and weaving that back into what you do. Surveys, discussions, exit interviews are all ways to get data. Have a clear process for gathering and using that data.

You have a business that is predictable, automatic, effortless and profitable.

## IN THIS STAGE YOU NEED TO:

Take time to look at every aspect of your business so that you can set you, your team and your customers up for a predictable, delightful experience.

## THIS IS IMPORTANT BECAUSE:

This is the only way you can make a business that doesn't have you spending everyday putting out fires. Many small business owners resist this stage and are forever stuck in reactive mode. I hear them say that a) their business can't be automated because every situation is different or b) they don't have the time to do this work or c) they don't want to turn their business into a soulless automaton.

Every business can be automated, taking the time to do this saves time and automation makes space for putting life into your business in a deliberate way.



# 6 STAGES TO BUILDING YOUR EFFORTLESS BUSINESS

## There you have it

1. Get clear on what you want
2. Dance until you know who and what you are doing. Make sales before even thinking about marketing.
3. Make it legal and official.
4. Get to really know your customer and craft their journey through your business.
5. Build your team and make the experience great for everyone.
6. Make your business easier and more profitable by making it automatic.

Take one stage at a time, and complete each before moving on to the next. Keep going until you complete it all.

If you feel yourself stuck and alone; remember, you are not alone. Join with other people just like you, following the same path and struggling in the same ways. You don't have to do it alone.

## Join the Business Owners Success Club online community

Join this online group of small business owners just like you starting and growing businesses.

You can expect a series of rapid, integrated, intuitive projects to get you up and running and help you build your easier and more profitable business.

We follow the 6 Stages to Building Your Effortless Business. The program is a series of projects to implement in your business so you start seeing results immediately. Each project is laid out with step by step instructions and everything you need to succeed.

You will have help along the way.

All the carefully curated resources, tools, hints, tips, tricks and hacks you need

Weekly Office Hours, open time to ask questions, get feedback and hear how others are doing

Guided program of projects with how-to resources to keep you moving

A cohort of others masterminding together to keep each other accountable to help each other succeed.

Others in the forum just like you to offer support, advice, stories, hugs and encouragement.

No talking heads. No theoretical work.

All action!

[Join Now!](#)