



**bosc**  
Business Owners Success Club

**WORK SMARTER  
NOT HARDER**

Photo by Anna Popovic

# BELIEVE THERE IS A BETTER WAY

*// It breaks my heart to see small business owners struggle like I have struggled.  
Our parents and our grandparents had businesses that allowed them to thrive and have a life at the same time. What happened?"*



What happened is we fell for the myth that small business needs to be managed like big business. That's not true. It complicates small business and focuses on the wrong things.

There is a better way.

To work smarter/not harder with more profit & less work.  
To make your business serve you. Not the other way around.

We need an operating system for non-MBAs that makes sense for small business.

A small business operating system (SB/OS).

# THE OLD MODEL DOESN'T WORK ANYMORE

// *Many business owners ask me if they need an MBA to help them run their business. No! They don't!*

*It's like using road engineering to build a path in your garden. Too complicated, too expensive and it takes focus away from what's important, not the path, but the garden. How you run your business shouldn't get in the way of having a great business.*

The default operating system for small business is the MBA model. The MBA model was designed in the early part of the last century as a way to divide the management of big business into functional areas. As businesses grew bigger and bigger, they needed this new thing: management.

Before that, business owners just did what needed doing in their business; and they made a great living doing it. Business owners were the class that built our communities. They were respected, they gave back and they even had a life. Then we complicated business.

The MBA model has us focusing on marketing, not treating our customers as the special people they are.

- We call our staff, human resources, not people who make our business what it is.
- We are told to implement systems to make our business more efficient, rather than systems to provide a better experience for everyone involved.
- We make numbers one of the main functional areas of our business, when they are just a measurement system and a way to pay taxes.

This struggle has become our new normal.

## WANT MORE CUSTOMERS ?

If you are like most business owners, you think about marketing and specifically advertising when you want more customers.

When you look into marketing for small business, you find out about brand, customer avatars and social media strategy.

That's MBA-think!

Every great marketer says the best way to get more business is to make your current customers ecstatic. Happy customers tell others. Marketers tell me about businesses that want them to sell the sizzle, without having any 'steak behind that sizzle'. If you aren't delighting your customers now, how can you confidently sell to new customers?

Do you know a business with a waiting list?

You can bet they are meticulous about creating a great customer experience. Their customers are loyal, they are raving fans and they bring their friends.

SB/OS thinking is to attract new business by serving & delighting your existing customers. By having a welcoming experience to engage new customers and by telling the success stories of your happy customers.

## WANT THE BEST STAFF ?

If you are like most business owners, you think about qualifications and years of experience when you think of good staff.

HR is about employee handbooks, remuneration packages and negotiating paid leaves.

That's MBA-think!

The best staff want to be paid well and have great benefits, but beyond that, according to Daniel Pink in his book, Drive: the surprising truth about what motivates us, they want autonomy, mastery and purpose. They want the freedom and the tools to do a great job.

Businesses I work with have the kind of employees we would all hope to have and are meticulous about creating and sustaining a great staff experience. Their staff are loyal, they are raving fans which makes them the best source for more great staff.

SB/OS thinking is to attract new staff by serving & delighting your existing staff. By having a welcoming experience to engage new staff and by telling the success stories of your happy staff.

# WHAT WOULD MAKE A GREAT BUSINESS FOR YOU?

You have heard that you need to put systems in place to make your business as efficient as possible and to squeeze the maximum amount of profit out of every transaction.

That's MBA-think!

Wildly successful small businesses focus on the relationship, not the transaction. The systems in place are designed to give everyone a great experience and to serve the needs of everyone. The experience, the environment and the value exchange are all focused on making it easy for customers, staff and the owner to serve & delight each other.

Like our staff, we want autonomy, mastery and purpose.

Does your business give you that?

**SB/OS** thinking is about building a business that gives you the ability to give your best to the world.

A business that gives you the autonomy to choose how to live your life.

A business that draws from your strengths and helps you continually gain mastery and to grow.

A business that serves a greater purpose by helping solve problems for your customers and your staff.

# CRAFTING A NEW MODEL THAT WORKS

You need an operating system that works for you; a Small Business Operating System - SB/OS

This new model focuses on what is most important in your business. Your people, of course. Your customers, your staff and you. Treat each with care by designing the journey with your business that begins and ends with serving & delighting. Their journey takes them from one place to another. They have a need that your business fulfills.

Each journey has three stages:

## Attract

When you will attract the best., your business will be easy to run. You can provide incredible value because you will be wildly profitable, which means you will be able to provide insane value, which will make you even more profitable.

## Engage

Engage them when you welcome them in, make them feel comfortable and reassure them they made the right decision. The first experiences with you set the tone for the complete relationship. Then, it is your time to serve & delight.

## Serve & Delight

Every journey begins and ends with serve & delight because you attract the best by serving & delighting the ones who are already with you.

You craft each stage with the experience, the environment and value exchange. Design these with deliberation and your business will work for you.

# CREATING YOUR BUSINESS FUTURE

Don't be one of those business owners who nods your head about how much sense this makes and then go back to your marketing, operations, finance and human resources.

Create a customer journey, a staff journey and your journey to serve & delight.

If you are like most, you have built your business by default. Different outcomes need a different kind of business. So define the outcomes you want and that will tell us what kind of business you want to build.

This workbook will guide you through that process.

This isn't an exercise you can do in one sitting.

Block off this weekend; schedule some fun, some alone time and some nature. This will help pull you up out of the weeds of day-to-day thinking and give you a higher perspective.

Think deeply about your answers. Write your answers by hand, it's part of the creative process. Use colour, draw or cut out pictures. Invest your creativity and make it yours. You can print this out or use other paper or a notebook.

Label each section: Owner, Customer, Staff

This is the future of your business we are talking about. And your future. You know, for your one and only life.

# AT THE CORE THE OWNER JOURNEY



The owner journey is at the core and is the one that gets ignored.

We are told that we have to sacrifice to build a great business. We convince ourselves that once things get going we will be able to relax. That we need extensive systems in place, before we can relax. All the while saying, "Some day.... "

How long is this supposed to go on?

When do we get to have a life?

When does the business begin to serve us instead of us being a slave to it?

In this section you will explore the differences between what you hoped would happen in your business and what has happened.

You will look to the past, the present and the possible futures.

You will look at the 30,000 metre view and the close-up minutia that makes or breaks a business.

By the end of this section you will know what you can do to make your business work better for you.

You will be clear on what a business that serves you looks like and how you can create that business.



Write or draw your initial ideas here:

*How would a business that serves & delights you look? Can you picture that? You can think about what you hoped your business would be and about other businesses you admire. You can think about what your business could accomplish in the world. \_\_\_\_\_*

*Why were you attracted and how did you engage in the beginning? Can you remember why you started your business? What had you hoped would happen? What attracted you to this business? \_\_\_\_\_*

*How much of that have you accomplished? What hasn't happened (yet)? What has changed in your thinking since the beginning? \_\_\_\_\_*

The five whys is a great exercise here to really dig in. When you answer a question, ask why, then why, again until you can't any more. Here's more information about this technique: [https://www.mindtools.com/pages/article/newTMC\\_5W.htm](https://www.mindtools.com/pages/article/newTMC_5W.htm)

## SERVE & DELIGHT

*How does your business serve & delight you now? What is working and needs to be preserved?* \_\_\_\_\_

*What is not working and needs to be changed?* \_\_\_\_\_

**Let's look to the future.**

*How do you see you and your business parting ways? What is your succession plan?* \_\_\_\_\_

*What do you hope will happen? (best case)* \_\_\_\_\_

*What do you hope won't happen? (worst case)* \_\_\_\_\_

We've looked to the past, the present and the long future. Now, picture yourself 3 years from now.

*What is your business and life like? How do you want to feel? How do you want to spend your days? How will your business serve & delight you? What kind of place do you want it to be?*

Paint a picture and make it wonderful. Describe it in detail. Go there in your mind.

Three years will pass in the blink of an eye, but, with consistent attention, you can make big changes. Let's dive into your experience of your business, the environment that supports or doesn't and the value exchange that will support you. Your experiences in your business are your business. They are how you open up, or shut down for the day; recurring problems and how you solve them; things in your business you want to do less of and things you want to do more of. They are how you spend your time in your business. They make you feel anger, joy, comfort or anxiety. Think about which experiences feed you and which suck your energy; which ones are easy, which challenging and which are just difficult.

*Which 3 experiences do you want to keep?* \_\_\_\_\_

*Which 3 experiences do you want to dump?* \_\_\_\_\_

Your environment makes your business easier or it gets in your way. Environment can mean everything from your physical environment, your mind, your community, the economy, the state of your industry, the sidewalk in front of your business, the weather. Any and all of those have a bearing.

*What 3 things in your environment bring you joy and make your work easier?* \_\_\_\_\_

*What 3 things in your environment bug you or slow you down?* \_\_\_\_\_

Stress and dissatisfaction come from a disconnect between value in and value out.

*What 3 things do you do that provide the most value in your business?* \_\_\_\_\_

*How much revenue do you get from each?* \_\_\_\_\_

*Which are your best opportunities for growth?* \_\_\_\_\_

*What do you enjoy in your business that is not revenue producing?* \_\_\_\_\_

*What costs you too much in time, money or energy?* \_\_\_\_\_

*How can you focus more on the things that add value and you enjoy; while spending less time on the things you don't like?* \_\_\_\_\_

## To Sum it all up...

Go back over what you have written and highlight the most important points.

*What's already working and you need to keep?* \_\_\_\_\_

*What needs to change?* \_\_\_\_\_

*Circle and number your top 3 priorities* \_\_\_\_\_



# BEGINNING YOUR CUSTOMER JOURNEY



Your customer journey begins and ends with serving & delighting your customers.

They start your journey with a problem, a need or a want. Your business must solve that problem, fulfil that need or satisfy that want. You can only do that if you know why they are coming to you. [The best way to find out is to ask them.](#)

People didn't come to my bookkeeping business just to get their bookkeeping done. They came to my bookkeeping business to get rid of the worry of taxes. I built on that by always having tea on hand and being ready to listen. I tried to teach them and mentor them how to read financial statements and how to understand their numbers, but they didn't care. That's not why they were coming to me.

When I asked them they told me words like comfort, relief and hug. You may be surprised when you ask your customers. I was.

Think about your favourite customers. The ones that bring a smile to your face. As you go through these exercises, think about them. Not an avatar, or a composite of them, but the actual people. Think of them by their names. You will in all likelihood need to ask them these questions.

We are notoriously bad at this because we are too close. Do you know what problem you are solving, need you are fulfilling or want you are satisfying?

*What is the starting point and the promise of your business?* \_\_\_\_\_

*What makes them choose you over anyone else?* \_\_\_\_\_

*How are you serving & delighting them now? What do they value most?* \_\_\_\_\_

## ATTRACT CUSTOMERS

Who are your favourite customers and how did they come to you? Do more of that to attract the same kinds of customers. Word of mouth is powerful so make it easy for your delighted customers to share your story. It starts by giving them a great experience to share with others.

### Experience

*What are some stories of your best customers?*

### Environment

*How can you make your environment tell the same story your customers are telling themselves?*

### Value Exchange

*Price is never the issue – value is. How can you increase value until your customer has no objections left and they have to buy?*

## ENGAGE

### Experience

*The first few experiences set the tone. How can you welcome in your new customers and make them feel they have made the right decision.*

### Environment

*How can you make it easy for customers to engage with you? This is everything from hours, location, access and how to pay.*

### Value Exchange

*Think about lifetime value not transactions when you engage new customers. How can you pile on the value immediately?*

## SERVE & DELIGHT

### Experience

*Every experience should work towards delighting your customers. It doesn't have to be big. Remember the tea I always had on hand?*

### Environment

*How can you make your environment reinforce that experience? I had a comfy sitting area in my office.*

### Value Exchange

*How can you continue to pile on more value making you comfortable to ask for more in exchange?*

## To Sum it all up...

Go back over what you have written and highlight the most important points.

*What's already working and you need to keep?* \_\_\_\_\_

*What needs to change?* \_\_\_\_\_

*Circle and number your top 3 priorities* \_\_\_\_\_

# BEGINNING YOUR STAFF JOURNEY



Your staff want more than to trade their life for a pay cheque. They want to feel they are progressing and making a difference.

Studies show that after basic living expenses are covered, money is not a motivator. Motivation comes from autonomy, mastery and purpose. Everyone wants to grow. Everyone wants to feel like more than just a cog in a wheel.

They want the autonomy to do the job in a way that uses their strengths and their interests.

They crave the process of getting better, of mastering their job.

They want to be part of something bigger.

Just like you do in your business. Not to get all meta on you, but we are all human and we all crave the same things. That makes it easy to relate to your staff. What did you like/not like when you worked for someone else?

*How can you give your staff more autonomy to make mistakes and learn while not bankrupting yourself from their mistakes? \_\_\_\_\_*

*How can you guide them to become masterful? \_\_\_\_\_*

*Can you clearly define the bigger purpose of your business? How can you tell them every day? \_\_\_\_\_*

*How much money is a living wage in your community? It is more than minimum wage. \_\_\_\_\_*



## ATTRACT STAFF

### Experience

*The best source of really great staff is your existing really great staff. Always be recruiting. How can you make that a part of your culture?*

### Environment

*Everyone should have a very clear idea of what is on offer. Is your business the kind where staff touch down for a short stint, or do they have long-term opportunities? That means knowing it and owning it.*

### Value Exchange

*When you want to attract the best, you have to provide great value and that means more than just a salary. What else can you offer? Remember autonomy, mastery and purpose.*

## ENGAGE

### Experience

*Create an orientation experience that makes staff feel welcome and like they are part of something bigger.*

### Environment

*Does your staff environment reflect how important they are to your business?*

### Value Exchange

*How can you build your business model around paying your staff a living wage?*

## SERVE & DELIGHT

### Experience

*Co-create a learning plan or a growth plan with each of your staff.*

### Environment

*How can you create an environment of autonomy and trust?*

### Value Exchange

*How can you make it clear to everyone what part they play in something bigger?*

## To Sum it all up...

Go back over what you have written and highlight the most important points.

*What's already working and you need to keep?* \_\_\_\_\_

*What needs to change?* \_\_\_\_\_

*Circle and number your top 3 priorities* \_\_\_\_\_

## To Sum it all up...

We went deeper into the Owner Journey, because everything flows from that.

Now go back over everything you have written and pull out the best ideas. The best will be a combination of easy to implement, low-hanging fruit and high-impact solutions.

List the top ideas here: \_\_\_\_\_



Please don't be one of those business owners who nods your head about how much this makes sense and then go back to your marketing, operations, finance and HR.

Create a customer journey, a staff journey and your journey to serve & delight. Create a business that supports your autonomy, mastery and purpose.

Want more on creating your SB/OS to make your business effortless?

This, too is a journey. Join the growing group at [BusinessOwnersSuccessClub.com](https://BusinessOwnersSuccessClub.com) If you aren't getting the newsletter, start there. Keep checking for more resources, events and support. You can do this! We can help.

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