



get started worksheets

## THE WHEEL OF BUSINESS EXERCISE

### **\*BEFORE YOU BEGIN:**

Ideally you'll fill out this worksheet while watching the DHL: The Club Overview video found on the Clubhouse main page. As you're watching the video, I'll let you know when to pause it and fill out this worksheet.

### **ABOUT THIS EXERCISE:**

The Wheel of Business exercise will help you determine which areas of your business need attention right now and where to focus your efforts for improvement.

Look at the wheel and rate each area of your business from 1 to 10 based on how satisfied you are with it by circling the number that corresponds to your satisfaction level. (1 = not satisfied at all, 10 = everything is perfect!)

Don't worry about interpreting the results at this point. Have this download handy during our New Member Orientation so we can work together to help you understand your results and figure out your next steps.

If you want to change the categories to fit your needs or do this exercise for your personal life, I included a blank Wheel on the last page where you can write in your own categories.

# THE WHEEL OF BUSINESS DEFINITIONS

Here are some general definitions and components of the areas of business on the wheel. Not every part of every area is listed as they can vary between industries but you'll get a general idea of what each one is about.



## **MARKETING & SALES:**

Anything that gets people interested in what you sell and your sales strategy including marketing, advertising, social media, newsletter, press, sales and lead generation.



## **BRANDING:**

This is the forward facing look and feel of your business and includes the name, design elements, mission, voice, style, positioning, story and promise.



## **OPERATIONS, ADMIN & SYSTEMS:**

This is how your business runs including efficiency, productivity, production, sourcing, tools and resources and standard operating procedures (SOPs).



## **FINANCES & ACCOUNTING:**

Everything having to do with money including pricing, accounting, bookkeeping, taxes, investments, invoicing and money mindset.



## **LEGAL:**

All matters having to do with your business being legally compliant and protecting yourself and your business including contracts, waivers, releases, business licenses and compliance.



## **CUSTOMER SERVICE:**

The journey your customer takes with you. This includes how you and your business interact with your audience in person or over email/social media plus what happens when they make a purchase or have an issue and your relationship with them.



## **INNOVATION & DEVELOPMENT:**

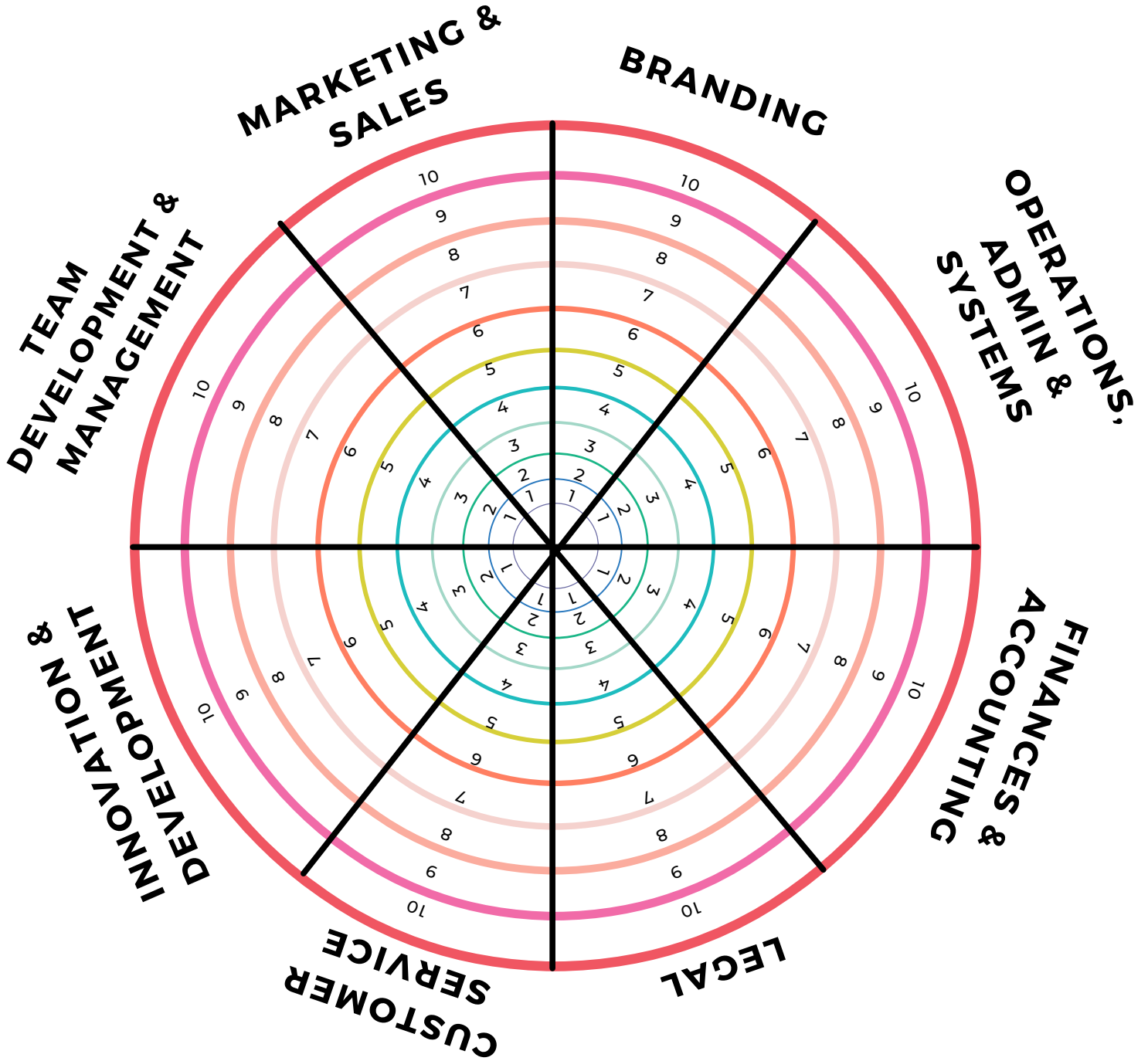
This is the ideation and creation of new products and services. Where research and development, brainstorming, experimenting and product testing happen.



## **TEAM DEVELOPMENT & MANAGEMENT:**

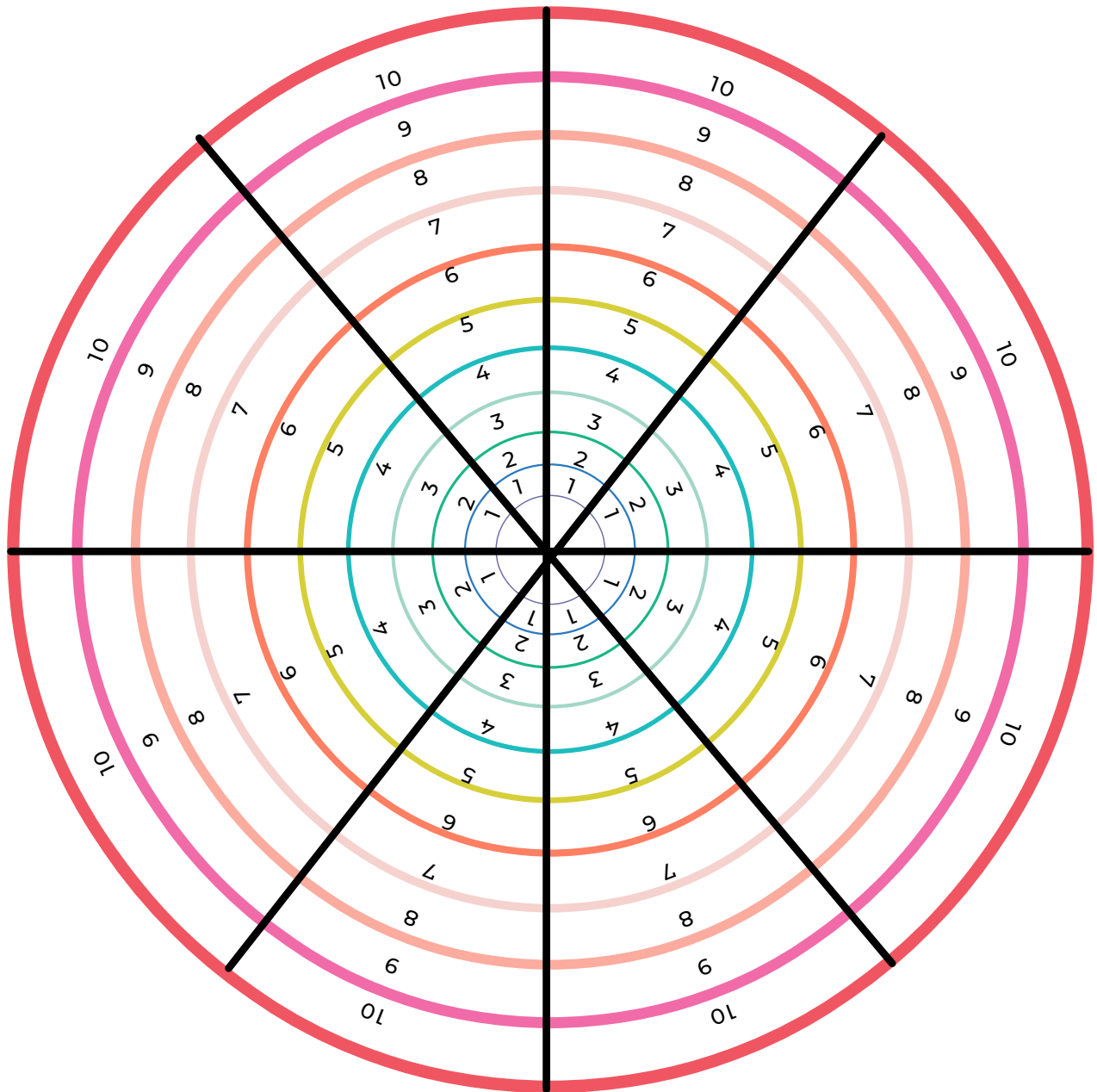
All things related to the people who work with you, whether they're employees or freelancers. This also includes onboarding, building relationships with your team and managing your team.

# THE WHEEL OF BUSINESS



## BLANK WHEEL TEMPLATE

Using the blank template below, you can write-in your own categories in each slice for your business or life. If you're going to do this exercise for your life, here are some common categories to get you started: Career, Relationships, Family, Spirituality, Finance, Fun and Self-Growth.



# THE WHEEL OF BUSINESS QUESTIONS

**PLEASE WAIT TO FILL OUT THIS PART OF THE WORKSHEET UNTIL YOU'RE FINISHED WATCHING THE OVERVIEW & ACTIVITY VIDEO:**

After you fill out the Wheel of Business, set aside about 30 mins to answer the following questions. Your aim is to come at these answers from a place of understanding rather than judgment. Resist the urge to beat yourself up when you're assessing the areas with the lowest numbers and instead look at those areas as opportunities for growth and learning!

**In which areas are your business' numbers the lowest?**

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**Why do you think these are the areas in which your business excels?**

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**In which areas are your business' numbers the lowest?**

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**Why do you think these are the areas in which your business is lacking?  
What is holding you back from having higher numbers in these areas?**

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# THE WHEEL OF BUSINESS QUESTIONS

Look at the areas that you ranked as 5 and under. Which of these are going to make the biggest difference for your business right now? List these areas below.

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Out of those areas, which one is the highest priority right now?

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List three things that you can do to bring up the number for that area by at least two points.

1. 

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2. 

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3. 

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Break each of those goals down into tasks. Since the number of tasks you'll have for each goal will vary, there isn't a dedicated space on this worksheet. Use a notebook or doc on your computer to break your goals down into tasks.

Next, schedule the tasks on your calendar. Be realistic and specific about your timing as you don't want to over(or under)whelm yourself.

Finally, make a plan to stay accountable. If you don't have an accountability partner yet, reach out for one in our Private Facebook community.

Download and fill out the Accountability Partner Guide to help shape your accountability meetings.

# ACCOUNTABILITY GROUP GUIDE

If you're great at keeping yourself on task or already have people in your life to keep you in check...awesome! If not, please reach out in our Facebook group to find an accountability group. Having weekly accountability meetings will increase your chance of making it to your goals by 60-90%! You can also form a triad but I don't suggest have more than three people.

**My accountability partner(s) name and contact info:**

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**How will you check in and how often? I suggest meeting weekly or at least every other week. You can also have a weekly email check-in and a bi-weekly meeting. (ie: Zoom, every other Thursday from 5:00-6:00pm).**

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**Here are some ideas for questions to ask during your meeting:**

**YOUR FIRST MEETING:**

- What prompted you to join The Club?
- In a few sentences, tell me about your business.
- What area of your business are you working on improving first?
- Share some of your goals.
- Have you broken your goals into tasks and scheduled them yet? If not, why not? How can I help you make this happen?
- Feel free to add some fun questions like what's your favorite podcast or TV show or what's your ultimate day off to break the ice!

**REGULAR MEETING QUESTIONS:**

- Do you feel like you're staying on track with your schedule and tasks? If not, why not?
- Are there any areas that you're having trouble in or feel stuck in? Why do you think you're stuck? What will help you move forward?
- Is there anything you need help staying on task with?
- Is there anything you'd like feedback on?
- Do you anticipate any difficulties as you look ahead at the upcoming week?