

Paul Hoyt's "Office Hours" Series



THE **Awakened** CEO System

Office Hours

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Welcome to Office Hours

- A relaxed, informal mentoring program for tribe members
- Held every Monday at Noon Pacific Time
- All recordings, slides, and exercises are archived in our member's area

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The Reasons

- Being a successful small business owner can be a great experience...
- But it's tough - you need support to be successful
- We want you to get to know us

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The Reasons

- First and most importantly, we want you to know that we care about you.
- We want you to succeed in every area of your life, whatever that means to you.
- We want you to find the **greatness**, the **happiness**, the **divinity** within yourself, and then remember it, embrace it, and live it every day.

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Our Passion

- Helping entrepreneurs and small business owners...

Get Clear
Stay Focused
Grow Faster!

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Today's Topic:

Business Cycles

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The Key Performance Areas



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The Key Performance Areas



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The Key Performance Areas



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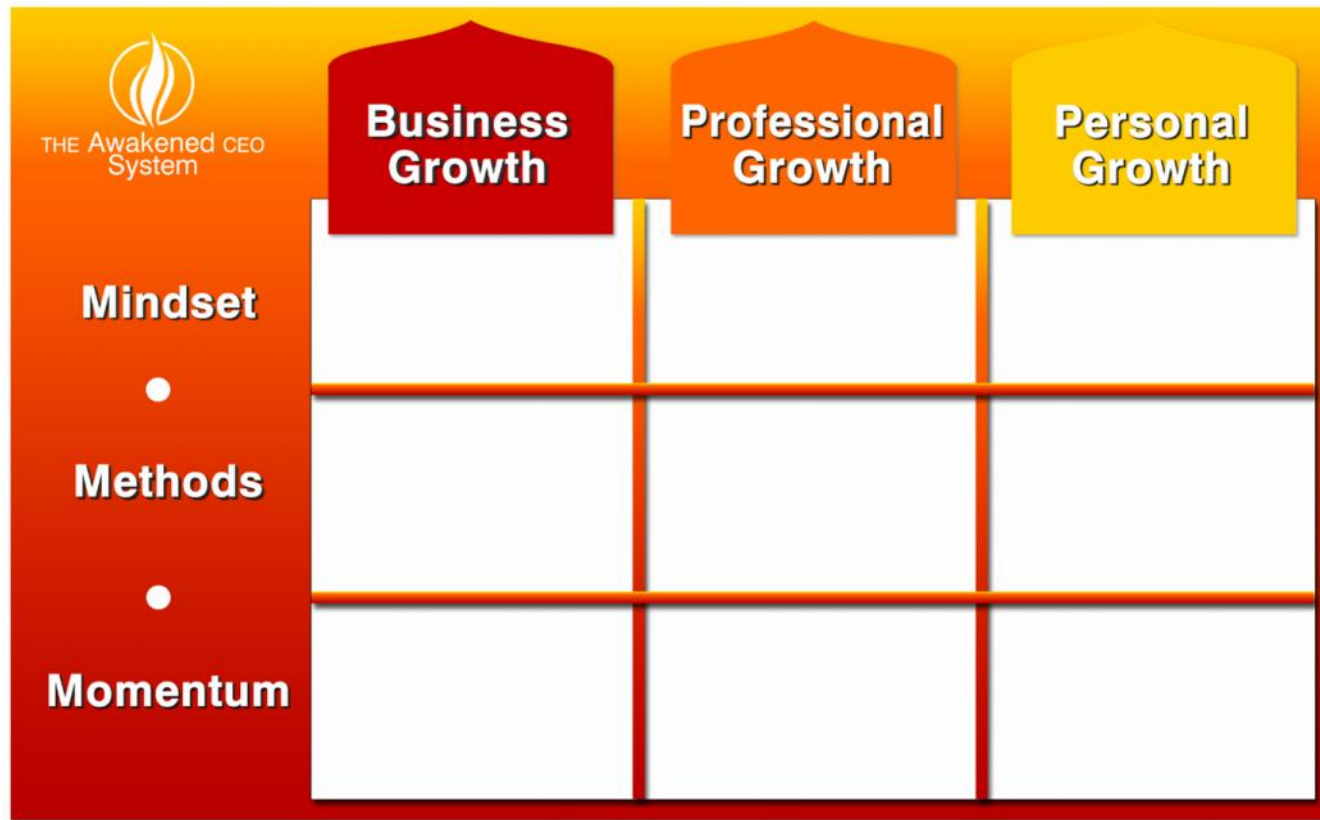
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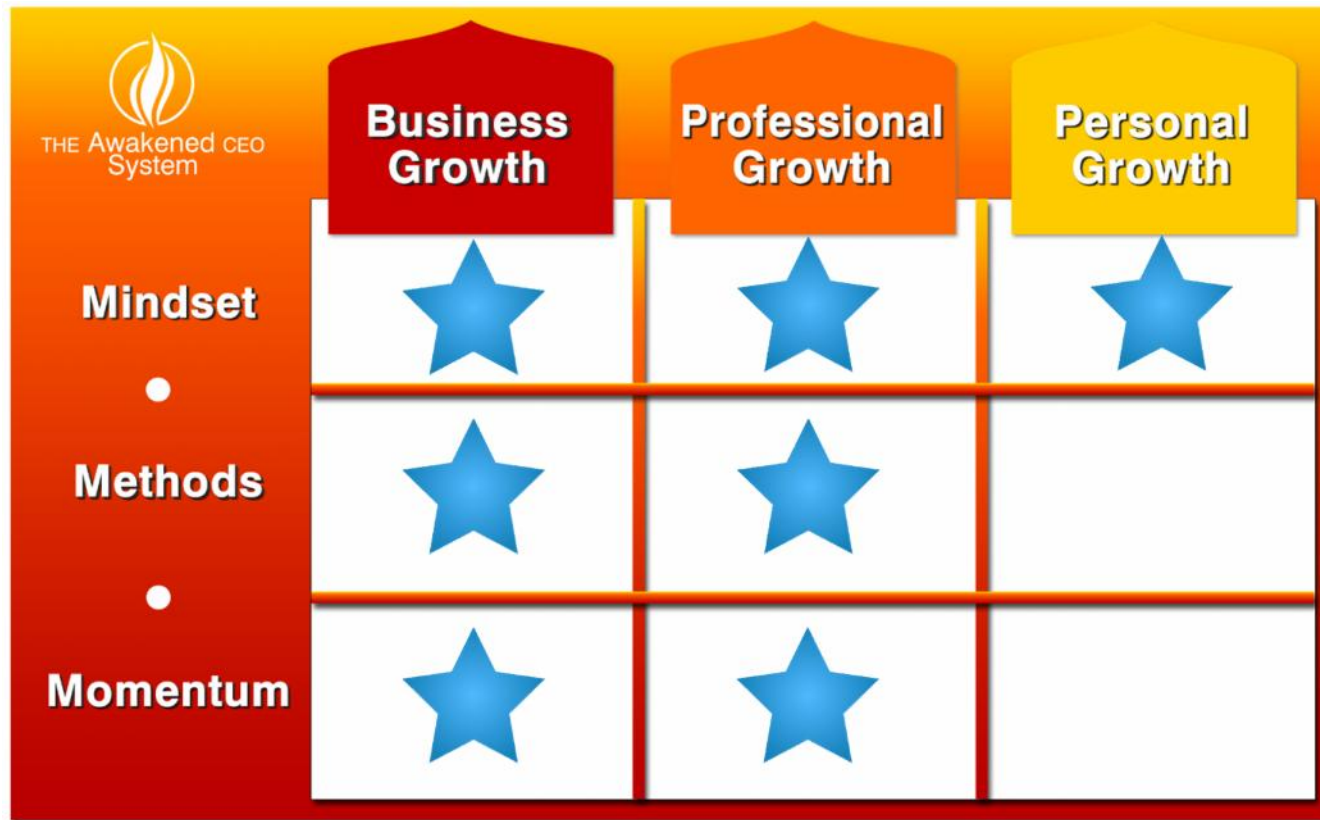
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Today's Agenda

- Annual Activities
- Quarterly Activities
- Monthly Activities
- Weekly Activities
- Daily Activities
- The Bottom Line
- Special offers

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Annual Activities

- Strategic / Annual Planning
 - Review performance
 - Reset goals and priorities
- Kickoff Meetings
- W2's and 1099's
- Tax Returns
- Business licenses

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Seasonality

- Summer / Winter
- Holidays
- School Year
- New Year
- Almost every business has some seasonality!

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Quarterly Activities

- Revisit Annual Plan or Phased Growth Plan
- Estimated Tax Payments
- Quarterly Tax Payments
- 90 Day Growth Plan
- Update any partner or investor materials

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Monthly Activities

- Review Quarterly Plan
- Update 90 Day Plan
- Set goals for the new month
- Monthly staff meeting
- Close the month
- Connection calls

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Weekly Activities

- Weekly goal review and tactical plan
- Weekly staff meeting(s)
- Schedule team member meetings

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Daily Activities

- Review performance from yesterday
- Review appointments for today
- Confirm appointments for tomorrow
- Set tactical goals for the day
- Process orders
- Daily self-reflection

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Closing the Month

- Take a physical inventory
- Process expense reports
 - Business expenses on personal cards
 - Mileage
- Download transactions from banks and other financial partners
- Assign expense and income accounts to the transactions

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Closing the Month

- Balance checkbook
- Reconcile bank accounts
- Make adjusting entries
- Create accruals
- Assess finance charges
- Send invoices and statements

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Closing the Month

- Review Financial Performance
 - Month by Month P&L
 - Month by Month Balance Sheet
 - Complete General Ledger
- Update all Key Performance Indicators (KPIs)
- Make Collection calls
- Back up your files!

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The Bottom Line

- Someone on your team needs to keep track of the required activities and make sure the job gets done!
- That's usually the CEO, CFO, and COO working together
- If you are not an organized, checklist-driven person, get someone who is!

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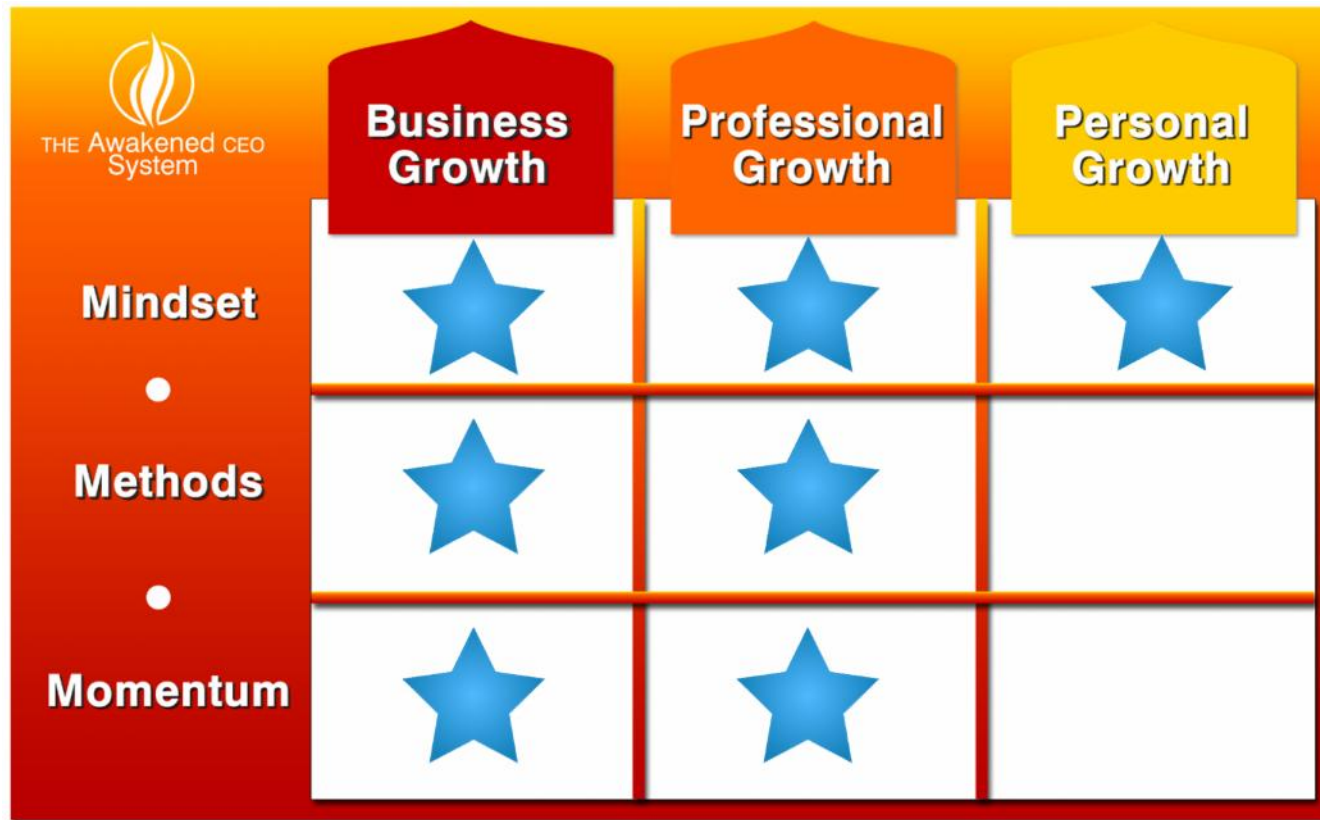
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Previous Office Hours

- 60 – The Vital Signs of Business
- 96 – Strategic Planning
- 107 – How to be Great at
Financial Management
- 142 – Reading Financial Statements

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Open Q & A

- Comments & questions on any topic!
- Survey: www.PaulsSurvey.com

Contact Me at paul@paulhoyt.com

call or text: 415.997.8001

www.SchedulePaul.com

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Next Office Hours: March 13th

- Topic is: TBD
- Let me know what topics you would like for me to address: www.PaulsSurvey.com

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“No BS” Business Growth Package

- 1** The Business Clarity Questionnaire
- 2** Phased Growth Strategy
- 3** Business Foundation Profile
- 4** 90-Day Growth Plan

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No BS Package

- 1 The Business Clarity Questionnaire
 - 2 Phased Growth Strategy
 - 3 Business Foundation Profile
 - 4 90-Day Growth Plan
- ~~\$1,500~~

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100% Money Back Guarantee

If you don't want to continue after the first session, we'll give you a complete refund

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*** AND ***

**If you don't agree that the
package was worth every
penny,**

You Set the Price!

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