

4 Q Road Map

PERMISSION to Plan to Prosper

Your winning holiday décor strategy for Professional Designers,
Decorators, Home Stagers and Florists

Planning Quotes

- A goal without a plan is just a wish – Antoine de Saint-Exupery
- A good plan today is better than a perfect plan tomorrow – George S Patton
- First, we speak it, then we write it, then we accomplish it. – Ann McDonald

If you are new...STAY!

Learn this BEFORE you begin

If I had this, I would have saved massive sums of money & time

4 Q Road Map Outline

1. Your Winning Strategy: 5 Minutes
2. The Quarters Big Picture: 20 Minutes
3. The Quarters Micro Picture: 30 Minutes
4. Templates, Calendars & More: 10 Minutes

Total Time: 65 Minutes

A Winning Strategy

Maps Help Us Help Teams

NO OVERWHELM

Holidays Come EVERY Year

The Win

Why – What – Wait....What?

Why a Road Map

- Sometimes we need route adjustments
- This is the practical tactical
- Not esoteric, *this is the nuts and bolts & separates the décor pack*
- What we map and measure we can prosper
- Time Blocking helps with this. If you want a training on Time Blocking, we will do a bonus training. I allocate NO MORE than 12 hours/month Quarter 1, 16 hours/month Quarters 2 & 3 & then TBD for Quarter 4

What's the deal with Quarters

- Sometimes we need some breathing & thinking room
- Easier to hit goals with creative types
- Helps our Clients experience as much or as little as works for them
- Helps us get our head and hearts around what it means for this particular holiday season, past-present & future
- Helps us build and equip effective teams

Wait....what?

We call it 4Q Road Map but **it's really 5 Quarters**, where the first quarter is also the 5th quarter...

Q1 is also Q5

Road maps help keep the process simple, especially if you are adding this on to your year round regular service offerings.

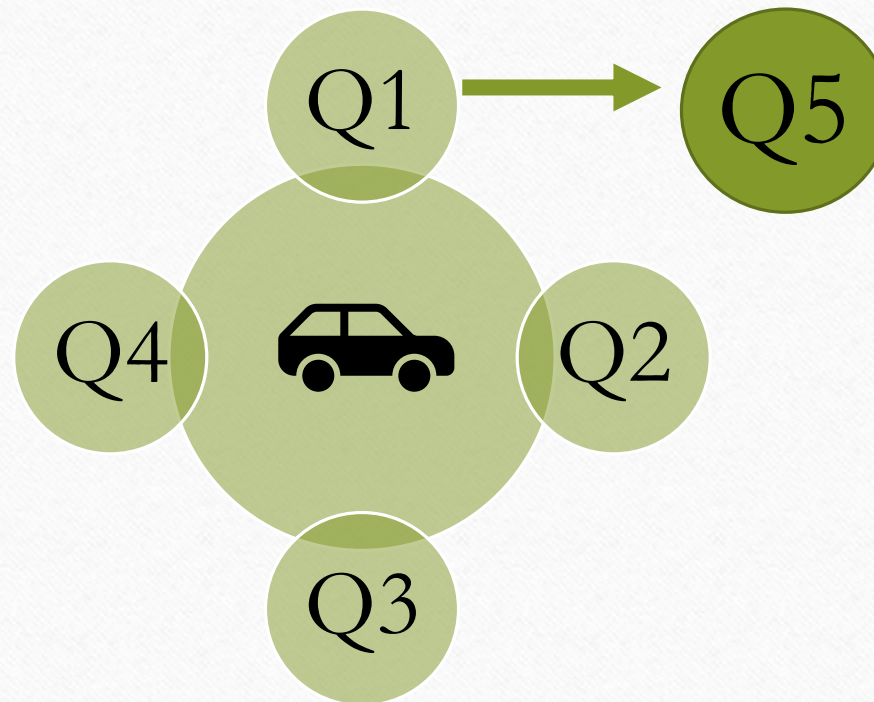
Wait....what?

Note: the 5th Quarter only applies to your second year or after, so no stress allowed if this is your first pass along this road....

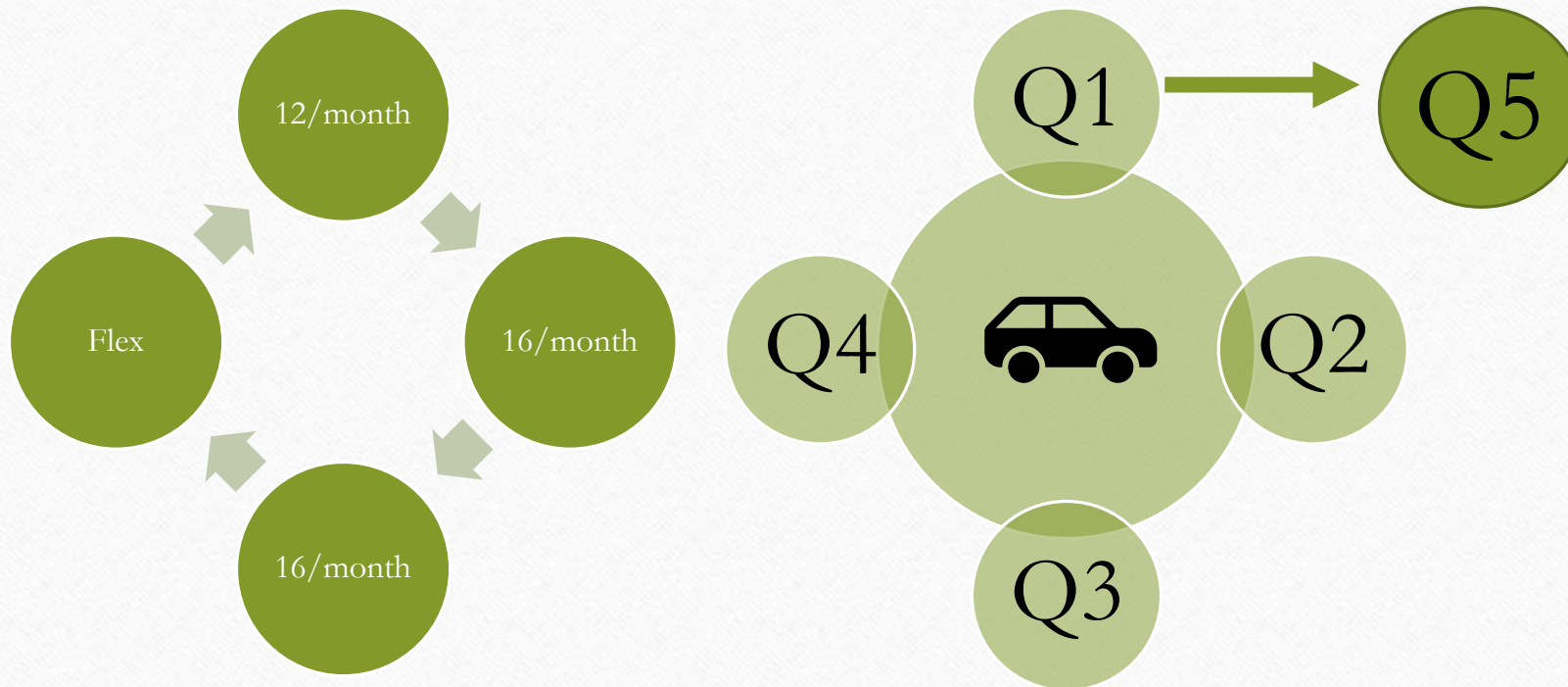
& the good news?

Road maps help keep the process simple, especially if you are adding this on to your year round regular service offerings.

4 quarters + 1



4 quarters + 1



Macro Picture Quarters

The Bullet List Big Picture

NO OVERWHELM

Holidays Come EVERY Year

Road Map Stops

- Your Big Picture: Trade Shows & Styles
- Prioritize & Edit Offerings Fiercely
- Develop and finalize trade relationships with local light installers & other day labor
- Order, Deliver & Practice Install with team if necessary
- Install & Nurture
- Follow up & follow through....

Calendar the Entire Year

- Develop a simple but achievable communication plan with potential clients based on your service offerings
- Social Media groups are great but don't get lost in them if they aren't your main road
- What I said about Social Media groups

Quarter 1: January, February, March

- Develop Your Big Picture including:
 - Services you'd like to offer
 - Packages you'd like to offer
 - Relationships with local light guys and payment for referrals (local laws)
 - Goals for income & number of clients
 - Social Media Strategy
 - Email Strategy
 - Styles, colors, accents & flourishes
 - Trade shows in Atlanta
 - Calendar out other trade shows

Quarter 2: April, May, June

- Prioritize and Edit Fiercely including
 - Your calendar of dates for holiday décor shows or tutorials
 - Film anything you can ahead of time & practice your styles
 - Order your wholesale materials ASAP
 - Develop your higher ticket client processes at this time (see my calendar)
 - Make firm boundaries around what you will and won't provide
 - Remember better to do a great job with a few & get great testimonials & reviews than to try to do it all poorly
 - Develop your 4 process, 5 budget areas & pricing sheets for services ASAP (see my templates)

Quarter 3: July, August, September

- Order, Deliver & Practice including:
 - Any holiday décor tutorials or design workshops you might host
 - Order making sure clients have paid
 - Deliver to clients anything that they will be installing themselves
 - This is prime workshop timing and training time
 - July – August is trade show in Las Vegas but in my opinion is a tad late for same year orders
 - Develop teams and practice installs if you have never done them before
 - Build out your team processes including booties, boards and how to handle any issues
 - Be the BEST by practicing

Quarter 4: October, November, December

- Deliver & Install including:
 - Calendar any open holiday installations you may have
 - Confirm any social media protocol with clients BEFORE install day
 - Confirm team member roles for each day
 - Plan rest days
 - Decide on a DEADLINE day and do not break them!
 - Remember, there is always next year!

Quarter 5: January, February, March

- Removal & Follow Up
 - Storage
 - Repair and restore
 - What worked and what didn't
 - Profitability schedule
 - Hours vs Money
 - Trades you partnered with, review and revisit

RESET to Quarter 1: January - march

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Micro Picture Quarters

This Year Priorities

NO OVERWHELM

Holidays Come EVERY Year

Q1: January February March

Your Professional Big Picture

Time Block and FOCUS

FIRST: What Do You Want to Offer

- Online vs Offline
- Virtual Delivery vs Physical Delivery
- Inside vs Outside
- Consultation Only
- Add Installation
- Price Point: SET SPECIFIC GOALS. Year 1 I recommend style consults.
- Template: USE IT. Keep it simple based on EASE of EXECUTION

SECOND: Trade Relationships

- Once you choose what you will offer...
- ...THEN develop trade relationships based on execution
- Light installers (landscapers), Delivery & Handymen Services
- Team members inhouse who can handle garlands/trees
- Year 1 I only worked with clients who had someone else put up the tree and their lights
- Check local laws with insurance and payments to trades (some need to be direct & you will take a consulting fee only)

THIRD: Strategy for Sales

- Develop your calendar for sales strategy based on your goals
- Personalize your email sequences for your client list (these templates will be uploaded to the educational site)
- Remember, typical sales to email lists (warm) hover between 2-5% and cold (less).
- Highly targeted conversions of 20-35% are easy if you have engaged your potential audience with specifics well ahead of time. 11 impressions or more help your clients realize they are excited to engage your services

FOURTH: Develop Your Style Opinion Now

- Develop Your Style Opinion Now
- One major key we've seen for sales is our signature style
- Have an opinion
- It's ok to be “wrong” for some
- You know your branding, clients and vibe
- Create a general outline for 3-5 style pictures (see templates) you can edit to three later in the year

FIFTH: Schedule Trade Shows

- If you are on year two or more, schedule out and plan which trade shows you should attend if need be
- We limit ourselves to every other year, one specific show, if that.
- REMEMBER your specific financial and client goals when considering this

Q2: April May June

Prioritize, Edit and Execute

Products, Services, Schedules & Templates

FIRST: Calendar

- Dates and times for products, services and email sequences
- Block time and block dates
- Edit the email sequences
- Use shared service especially for teams: we use Google & have “year” as part of the email so we can easily sort

SECOND: Filming

- Film anything you might need or use for your Holiday Décor Business Now!
- One stream is a live stream software you can use to livestream recorded video if you have pre-scheduled tutorials
- Make a video shot list and calendar it in this second quarter

THIRD: High Ticket Clients?

- Develop your higher ticket client processes at this time if you have them

FOURTH: Firmly Choose Styles

- Firmly choose your three (3) style options
- More only if you have a team
- Better to be on brand and serve a few clients well than to be overloaded
- Even basic styles or themes or color stories can be customized
- Remember clients are coming to you because of your style

FIFTH: Working Templates

- Develop your 4-Process
- Develop your 5-Budget areas as needed
- Develop your Pricing Sheets as needed
- I prefer to finish these in Quarter 2 so they are done and in shared folders
- Establish firm boundaries around where you will and won't flex
- I establish upsells and onramps for special situations when I want to have options (see templates) for flexibility for a few clients

Q3: July August September

Practice, Source & Deliver

It is starting to heat up, keep calm and carry on in peace

FIRST: Source! Now!

- Is there any product you don't already have for what you are planning to provide?
- Source it now. Wholesale. Retail. Amazon. Costco. Craft warehouses...
- We tend to manufacture and/or order a year ahead, but will often source smaller items as soon as they arrive in store to avoid storage issues or cost over runs
- If you are embarrassed to shop Holiday when it first comes out, send a team member 😊!
- I set a budget every year for the dollar store and craft stores. We send in team members to gather items that are unique or oversized and buy in bulk.

SECOND: Sales

- Begin the sales process with emails and connections via text
- Have a calendar that people can see and book easily from
- Reward the early bookers

THIRD: Hosting Workshops

- This is prime time to host a DIY Type or Training Tutorial Workshop
- Can be a lead in to a paid or more expensive option
- DIY to Done With
- Done With to Done For
- DIY \$
- Done With \$\$
- Done For \$\$\$

FOURTH: Develop and Hire Teams

- If you have teams for short term help, develop them now
- Practice walk throughs with teams
- Walk throughs don't take long, but a well practiced team is an expert team

FIFTH: Create Your Onsite/Online Process

- Create a simple process checklist for your onsite or online offerings
- This doesn't need to be complicated
- Do you have branding for onsite? Booties, Room Boards, Procedures
- Insurances
- Confirm other trades and their calendars with shared software apps
- Be the best by practicing

Q4: October November December

Deliver Meeting Managed Expectations

Rubber meets the road!

FIRST: Expectations and Confirmations

- Calendar any scheduled events, installs, deliveries
- Confirm with calendar apps or software
- Clients are happy when what they expect is met and only slightly exceeded...too much is well, too much
- Make a clear communication of when you will arrive, what you will provide, how the time will be allocated and what your client should be doing while you are there

SECOND: Protocols

- Create a What to Expect (see templates) document for your clients if doing on site installs
- Personal is awesome, until the boundaries get super blurred and you are being paid for the equivalent of 4 hours and it ends up being 8 due to social talking
- We have a social media protocol we ask clients to follow, which is, basically none until we are done – do what works for you, but team members and installers tend to not like to be filmed

THIRD: Plan Rest Days

- Don't work 7 days a week, please
- Not even God does that 😊
- Plan rest days for your teams and yourself
- I personally only do two installs per day
- If you have team members, they need rest too!
- Scarcity breeds authority

FOURTH: Create a Deadline

- When do you want to stop? Set that date and stand by it
- Remember, there is always next year

FIFTH: Flexible Fun!

- There are often clients who ask to be on the calendar in October
- I will set aside a few spaces for these
- If this is your first year doing physical installs or on site consultations, allow for this as it's a new service for your client list
- Also, if this is year one, allocate up to 5, 45-90 minute onsite consults where you will help clients with their holiday décor, either with verbal counsel or a tweak here or there – this helped me see what my clients had and would need the next year! It was covert research! Very helpful. Put a price on these, even if small.

“Q5”: January February March

Removal and Storage

The last interaction you have sets the tone for the next interaction
you have

FIRST: Schedule Removal and Storage

- If you are removing items incorporate this schedule into the booking process
- Clients must schedule a removal date and time when they book their install date and time

SECOND: Reviews

- Establish an easy way your clients can give you online feedback
- We use google forms with simple questions and include a bonus ornament if they do so for next year
- *Find out how their experience was compared to their expectation*

THIRD: In House Review

- Set aside time to determine what worked and what didn't
- Were you profitable
- Does the pricing model need to change
- How did the team do
- How did you do with the team if you had one
- How did the trades work out

FOURTH: Poll Trades

- Get feedback from hired out trades and partners
- Use google forms for fastest response
- Offer a bonus or thank you gift for filling out the form
- This is one of the most important follow ups for long term working relationships

FIFTH: You

- What worked for you from a personal standpoint?
- What do you want to offer next year?
- Did holiday add value to your brand?
- If so, where and how much
- Set goals for next year

Template Section

Simple forms to make life easy

Calendars

- We use google calendar and Calendly for scheduling clients

Time Blocking

- This is my actual spreadsheet for time blocking in 3 month increments

What to Offer

- This is a series of questions that will help you determine what to offer

Email Sequences

- This is a sample series of email sequences you can edit to engage clients

4 Process

- This is the simple system I use to create easy flow charts for clients

5 Budget Areas

- These are the 5 areas you should allocate budgets for when doing onsite installs

Product Pricing and Profit

- This is my actual spreadsheet for pricing out service and product options. I use this to determine potential sales numbers
- <https://drive.google.com/open?id=1mp6JnUQapkC2CpO0ujvwwX8j8vgvyD0P>

All templates are only accessible to fully paid members

Expectations

- This is a sample of a What to Expect document

Polls

- This is a sample series of poll questions you can use to gain testimonies
- <https://drive.google.com/file/d/1AeAp92BrewGeZrdTb3HXentrBvELw54D/view?usp=sharing>