

UpShiftEntrepreneur Business Blueprint

12 Modules For Entrepreneurial Reference, Training & Success

How To Create More Money & Abundance & How To Reset Your Financial Barometer

Contents

Module 1 goal sheet
Introduction
We are the money-makers
We trade money for our energy and input
Powerful money mug exercise
How to recognise your sub-conscious money story that is holding you back
Resetting a financial barometer
A brief history of money
How long can current financial systems be sustained?
How to eliminate money as a barrier to doing business

Have You Got What It Takes To Be An Entrepreneur & Is Owning A Business The Right Thing For You?

Contents

Module 2 goal sheet
Introduction
How far into the process of starting your own business are you right now?
What is your motivation for starting your own business?
- Which beliefs are driving your motivation?
What are limiting beliefs
What limiting beliefs do you have that stop you from experiencing life to the fullest?
How to dismantle limiting beliefs
The power of words
Personality traits and their influence on business success
- Examination of your own character traits
Characteristics many entrepreneurs have in common
What type of start-up business can be created and run on a small budget?
How much is it going to cost to get you up and running and to keep you going for the first year?

How To Create Or Fine-Tune A Vision, Mission & Identity

Contents



Module 3 goal sheet

Introduction

Purpose of your business and overall goal - what does it look like?

The Importance of lateral thinking

- Brainstorming
- Looking at your creation through the eyes of 6 different customer types
- Draw or paint a picture or symbol of what you are creating
- Create a collage of images with materials from nature or cuttings from magazines
- What are the benefits, potentials and shortfalls of what you are creating?

Vision and Mission Statements - what are they and why are they important?

- Create your own Vision Statement
- Create your own Mission Statement
- Create your own Company Policy

Company Registration, IP Protection, Legal Structure Of Your Business, B-BBEE Compliance & Tendering

Contents

Module 4 goal sheet

Guidelines - what to take into account when you name your business, product,/service

- Name your company and make notes about how the name meets the guideline criteria
- Name your product/service/process and make notes about how the name meets the criteria

Guidelines - creating a logo

- A note on choosing colours
- Sketch your logo and make notes about how it meets the guideline criteria

What you need to know about company name reservation and company registration

Understanding Intellectual Property (IP) and why it is important to protect it

- Licencing
- Copyright
- What constitutes copyright infringement?
- Trademark protection
- Patents

Protection of Personal Information Act No. 4 of 2013 (POPI Act) - and its impact on your business

Understanding the three main types of business

Determine the legal structure of your business - what type of company are you forming?

- Non-profit companies (NPCs)
- Co-operatives (Co-Ops)
- Sole Proprietor (Inc)
- Personal Liability Company (Incorporate - Inc.)
- Private Company (Pty)
- Public Company
- Foreign/External Company
- Business licences and permits

What to take into consideration when you buy an existing business

- How to determine the purchase price
- What you need to be aware of when you buy a franchise

Regulatory check-list for SMEs, B-BBEE Compliance & Tendering

How To Have The Right Business Location & Legal Agreement

Contents

Module 5 goal sheet

Where will your business operate from?

- Factors you need to take into consideration

Important considerations concerning lease agreements

What are the benefits and responsibilities of working from home?

Organizational Structure & Staff Optimization Including Meeting Legal Requirements

Contents

Module 6 goal sheet

Positions and key responsibilities

- Have all business tasks been distributed appropriately among employees?

Organizational chart

- Create (or refine) your company's organizational chart

Take a fresh look at your existing staff and their positions

Employer and employee responsibilities and obligations

Important considerations concerning payroll

Why you need to issue an employee with a letter of employment

Identifying staff training requirements (hard skills and soft skills)

How to master the recruitment process

- How will you find the right people?

- What you need to find out about the person you are hiring

- Create your brief to a personnel agency

- Recruitment recommendations

South African labour rules and regulations with information and links to documents on the internet

- The Acts you need to display at your workplace in South Africa

- Labour Relations Amendment Act Number 6 of 2014

- Basic Conditions of Employment Act

- SA Labour Guide and CCMA Codes Of Good Practice (links to some of the more common ones for quick easy access)

- Commission for Employment Equity Report 2015 – 2016

- Department of Labour - Labour Relations Act and Amendments

- Employment Equity Act (EEA) No. 55 of 1988

- Employment Conditions Commission

- Protected Disclosures Act No. 26 of 2000

- Promotion of Access to Information Act 2 of 2000

- Promotion of Administrative Justice Act 3 of 2000

- Sector Education and Training Authorities (SETAs) and the Skills Levy

- Baseline Study of the Activities of the SETAs in the Western Cape Province

- Skills Development Act 97 of 1998 amended by the Skills Development Levies Act 9 of 1999 and Skills Development Amendment Act, No 31 of 2003



- Unemployment Insurance Contributions Act No. 4 of 2002
- Department of Labour
- Claiming Unemployment Insurance
- Occupational Health And Safety
- Occupational Health And Safety Amendment Act No 181 of 1993
- Questionnaire
- What one should include in the Safety, Health and Environment (SHE) file
- Compensation for Occupational Injuries and Diseases Act No. 130 of 1993 (COID)
- What you can do to prevent the risk of a fire breaking out
- How to prepare for medical emergencies
- How will you safeguard against crime in the workplace?

How to access important South African Government notices and tender documents

- Government Gazettes
- Legal Gazettes
- South African Government Services
- Parliamentary Monitoring Group

Understanding the platforms available to you to handle disputes in the workplace in South Africa

- Constructive Dismissal
- Commission for Conciliation, Mediation and Arbitration (CCMA)
- Pre-Dismissal Arbitration
- Conciliation
- Arbitration
- Con-Arb
- Condonation
- Private dispute Resolution Agency
- Workplace forums
- Trade unions

- Basic guide to strikes, lockouts and picketing

List of registered bargaining councils in South Africa

- List of registered private sector bargaining councils (per industry/ Sector) in SA (Oct 2016)
- List of Registered Local Government And Government Bargaining councils in SA (Oct 2016)
- List of Registered Statutory Councils in South Africa (Oct 2016)

How To Get The Best Out Of Your Leaders And Teams

Contents

Module 7 goal sheet

Who are the different “bones” in your business?

- How can they be transformed into backbones?

Characteristics of poorly performing, average and winning teams

Team leaders - how to maximize team performance

- Powerful questions out of key learning points to stretch you and your team

Why On-Going Market Research Is So Important

Contents



Module 8 goal sheet

Introduction

How to maximize value for your customers

Understanding the two main types of market research

- The 4 Ps of marketing

What is the value of doing market research?

Understanding demographic research

Understanding psychographic research

Examination of customer profiles and niche markets

How to estimate the size of your target market

Why it is important to know what your competitors are doing and how you can find out

- How to collect data

Guidelines for creating your own questionnaire

The different question types you can use in your survey and how they evoke different answers

How you can avoid getting dishonest/inaccurate answers

Working with the results of your survey

- Analyzing data

- Creating profiles for each of your competitors

- SWOT analysis

Create your own questionnaire

How To Create Successful Publicity Campaigns & Communicate Effectively

Contents

Module 9 goal sheet

Introduction

Platforms you can use to reach your target market

Branding tips

Apps

Email etiquette : guidelines for creating good emails

How to write professional press releases

Printing - useful tips

Factors to take into account for a successful product launch

- Plan a product launch

- Create your theme and invitation

Social media

Learn and apply these teachings to build a successful website

Call-To-Action : why it is important and how it can be used to attract higher response rates

- Create your own calls-to-action

Introduction to active view metrics

How to optimize the money you spend on social media platforms

- A/B testing explained

- Multivariate testing explained

- How to conduct cross-browser and cross-device tests

- How to increase page load time

- Important things you should know about keywords

- How to switch off Google personalization

How to create the keyword phrases that lead people to your website

- Pay per click advertising



- How to make Wordpress sidebar widgets “sticky” & float with webpages
- Time to test how effective your website is
- Explanation of some common internet terms
- Your messages to your niche markets
- What message are you going to put on what platform?
- What incentive are you willing to offer (to drive sales)?

How To Create Sizzling Sales Teams

Contents

Module 10 goal sheet
 Introduction
 Fundamental considerations for the sales department
 The Importance of authenticity and credibility
 Customer relationship management
 Joint ventures for workshops, seminars and exhibitions
 Explore how you could team up with someone else to both of your benefits
 What is your unique selling point?
 Understanding what an “Elevator Pitch” is and creating a powerful one of you own
 How to expand your database
 The importance of networking and how to go about it
 Simple ways to master “Cold-Calling”
 Overcoming objections and obstacles to closing a sale
 What to do immediately after a customer has bought your product/service
 How to keep your customers
 Talkers - how can those with “the gift of the gab” help you?
 Customer communication tips

Mastering Financial Statements, Terms, Ratios & Legal Requirements

Contents

Module 11 goal sheet
 How much money do you need and for how long?
 - List your overall costs each year for five years
 - List your estimated income/sales each year for five years
 - List your estimated gross profit each year for five years
 What method will you use to price your product/service/process?
 - Some popular pricing models explained
 - Break-even point
 - Safety margin
 - Pricing check-list
 Legal issues which affect pricing (including the Competition Act and Consumer Protection Act)
 Important financial concepts and terminology explained
 Important financial ratios and formulas (supplied) to calculate business health
 Why financial statements are important
 Understanding debits and credits

Understanding Cash Flow Statements (with free excel template : Appendix 2)

Understanding Statements of Comprehensive Income (with free excel template : Appendix 3)

Understanding Statements of Financial Position (with free excel template : Appendix 4)

Understanding Statements of Changes in Equity (with free excel template : Appendix 5)

Limitations of financial statements

Understanding what levies and taxes individuals and companies must register and pay for (SA)

- Claiming back from the SDL levy

Where is the money going to come from to finance your business requirements? (Options)

- Planning for unexpected events (covered in more detail in Module 12 as well)
- Why it is important to pay yourself
- Personal funding
- Private loans
- Private equity investments/Buy-Ins
- Bank loans
- Crowd funding
- Government grants

Ways to save money, improve efficiency and increase revenue

A customer's perception of value

Changing the way you receive payment and adding more payment options for your customers

Good record and control practices

- Records SARS want you to keep and how long you must keep them for

Orders and deliveries

How to choose your financial advisor

Module 11 completion form

Appendix 1 : Expense List Template

Appendix 2 : Cash Flow Statement Template

Appendix 3 : Statement Of Comprehensive Income Template

Appendix 4 : Statement Of Financial Position Template

Appendix 5 : Statement Of Changes In Equity Template

Appendix 6 : Quotation/Purchase Order Template

Appendix 7 : Invoice Template

Appendix 8 : Statement Template

Appendix 9 : Receipt Template

How To Create Your Business Plan, On-Going Strategy & Succession Plans, Savings Plan And Great Guidelines

Contents

Module 12 goal sheet

Preparation

- Plan your planning
- Practice prioritising in terms of urgent and important

How to create your business plan and what you need to include

- Example of a confidentiality agreement & create your own

How to create an on-going strategy plan

- Additional considerations for staying on track

How to negotiate a good contract with suppliers

How to identify the right resellers and distributors

- Issues you need to address

How will you create and sustain win : win relationships?

Great online tools for your business (includes links)

Preparing for the unexpected, retirement and succession

- Disability

- How can you prepare for the unexpected?

- How can you start safeguarding against having “all your eggs in one basket?”

- Pensions

- Provident fund

- Retirement annuities

- Savings plan

- Preparing to sell your business

Useful information and great guidelines

- How to make the “right” decisions

- Why it is prudent to be cautious when getting advice

- How to effectively deal with problems

- Effective time management

- Meditation and relaxation

- Maintain equilibrium and balance

- Staying ahead of the game

Module Feedback Form

