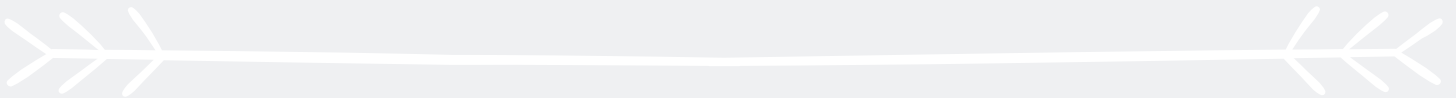


Financial Strategy

Guide

+

Prompts



Financial Strategy Guide + Prompts



Strategy 1: cash flow + profitability

CASH FLOW:

How does your cash flow currently feel? Tight, flowing, out-of-control?

What could move it in a more positive way? (Think of options that are more diverse than selling more. Unless you're just starting out, then go ahead- sell more!)

PROFITABILITY:

Including your time, how much does it cost to provide each product or service?

What do you feel needs to change here?

Financial Strategy Guide + Prompts



Strategy 2: strong foundations - (the 3 S's)

STRUCTURE:

What parts of your business, the way you make money and deliver your products or services feel really good + work for your life?

What could be changed to feel better?

STRATEGIES:

What is your plan of attack, if your goals were an 'X' on a map, which pathways do you want to take to get there?

SYSTEMS:

What is one repetitive process you could make more efficient?

Where are the bottlenecks in your business?

Financial Strategy Guide + Prompts



Strategy 3: finance fundamentals

BANK ACCOUNTS:

Can you structure your business bank accounts better? General business, tax, emergency accounts are a great start.

Where are you mixing up personal and business payments?

Where are there any shortfalls? Or where do you feel any points of struggle with separating your business cash out?

BOOKKEEPING:

How can you use bookkeeping to be a useful tool for yourself?

MONTHLY FINANCE REVIEW:

What is the next step to implementing a **Monthly Review** in your business?

Who wrote this?

Me. Lynda James.



I'm the (non-grey suit wearing) accountant and business analyst behind Valo Financial. I help business owners make and manage money differently.

I work with businesses to 'uncomplicate' business finances, focusing on increasing profitability and cash flow and designing sustainable businesses.

I believe the financial landscape is more confusing than it needs to be and that you don't need to be a 'numbers nerd' to make great financial decisions in your business.

And that running your own business shouldn't compromise your health or lifestyle.