

The
***Anti-
Overwhelm
playbook***

*for profitable small
business owners*



GEOFF WELCH
CONSULTING

This is an invitation to a new relationship with your business.

Much of the overwhelm experienced by the profitable small business owners I have coached across the years is the result of four basic things:

- 1. they haven't clarified what they want their business to do for them (beyond the money)*
- 2. they have systems and processes that are broken*
- 3. they haven't documented their processes clearly*
- 4. (as a result) they don't delegate effectively and have become a single point of failure in their business.*

Put another way, they get overwhelmed because their business has become their boss.

*They don't own a business,
they own a job.*

*I have personally made every one of these mistakes
in my own business, and this PDF encapsulates
the essentials of how to overcome them.*



Clarify what you want

You have revenue goals and benchmarks to ensure your company is on the right track financially, but have you ever considered getting really explicit about the other ways you expect your business to provide for you?

In the same way that your employees need a job description to understand what you expect from them and how their performance will be measured, **your business needs a written purpose** so YOU have clarity about what you expect from it and how its performance (*beyond the financials*) will be measured.

This description doesn't have to be elaborate, it just needs to be a crystal clear picture of what your business exists to do **for you**.

Some examples...

- *My business affords me the ability to travel 3-months of the year.*
- *My business enables me to work from anywhere.*
- *My business helps me generously support the causes I care about most.*
- *My business gives me a platform from which I can teach others.*
- *My business is my favorite game to play.*
- *My business enables me to offer my product/service without compromise.*

Getting explicit about **what you really want** from your profitable business is the first step toward the organizational change you will need to make in order to make your small business work for you.

Assess your systems and processes

With a clear purpose for your business in place, it's time to consider which systems and processes need to be retooled or invented to move you closer to having a business that truly works for you.

- What problems or challenges exasperate you the most? What system/process needs to exist (or exist in a different way) to solve that issue?
- Do systems/processes currently exist that are literally **blocking you** from having a business that works for you? Have you placed yourself in a central role for duties that are incompatible with your desired outcome? What do you need to do to free yourself? *(Extricating yourself may take time and patience)*
- Do challenges surface because you need to implement a system/process that doesn't currently exist?
- What frustrations do your clients/customers talk about most? Is there a broken system/process at the root of these frustrations? *(Do you simply need a better way of managing their expectations?)*
- What questions do your clients/customers ask the most? If you get the same questions over and over again, you have a messaging problem. What would be improved by finding a way to preemptively answer their questions?

Document all the things

Once systems and processes are shored up, it's time to start documenting their execution. If you don't presently have much in the way of documentation it can be overwhelming to consider how to capture and document all the processes you employ in your enterprise, but this truly is an exercise in eating the elephant one bite at a time.

Documenting isn't as difficult as you may fear and the rule of thumb is that simpler is better. Don't worry about developing a grandiose catalog, just document one thing today, another tomorrow, and watch the pile grow.

A variety of tools exist to help you store and organize these training documents, but a bunch of text documents in a shared Google Drive folder gets the job done.

Use photos where helpful, but don't let it slow you down. You can always add those details later if you are using them as an excuse to start tomorrow.

- Which processes are most mission critical? These could be a great place to start.
- Which processes will be easiest to capture? These could offer you some quick wins.
- Could some of your employees document the processes they use most? If so, start by providing an example of what you expect the documentation to look like. Review their work and offer any feedback early to ensure they don't repeat errors and to reinforce the value they are providing.
- What would you love to **stop** doing? Creating a clear set of instructions is the gateway to getting those tasks off your plate.

Spread the work around

Every well-documented process is an opportunity to delegate.

Some of the small business owners I work with are dying to delegate. Others are reluctant to let go of anything. Your mileage will vary, but your ability to delegate will absolutely impact your ability to build a business that works for you.

If you've ever told yourself *"it will just be faster to do it myself,"* I need you to listen closely to this next part.

It is only faster to do it yourself if it only happens once, and that isn't even always true. If the task in question needs to be done over and over again, or may need to be done in your absence, you are actively working against your interests by not ensuring others are equipped to handle it.

Do not make yourself the single point of failure.

You may be thinking that you don't have enough employees to delegate to, or that the employees you have are already maxed out. Get creative! Myriad options exist for you to delegate to someone who is not an employee of your organization. I call it hiring a solution.

- *My Executive Assistant is a fractional remote contractor. So is my bookkeeper. And my graphic designer.*
- *A janitorial service can keep your space freshened up.*
- *IT contractors can keep your computer systems safe and reliable.*
- *Stop wasting your time fixing it yourself. Call a plumber or electrician.*
- *The internet is loaded with people who would love to manage your web site, social media, and even content creation.*
- *You can even delegate plenty of tasks to software, like having Chat GPT draft a sales email or creating rules in your email software to filter, organize, and even respond automatically.*

It's okay to ask for help

If you clarify what you want from your business, design systems that support that outcome, document your processes clearly, and delegate effectively, your relationship with your business will change dramatically.

You will feel less overwhelmed, and your business will truly begin to work *for* you, instead of the other way around.

Simple, right?

Listen, I have been exactly where you are and I know that there is a massive gap between knowing what to do and knowing how to do it.

All of these pathways are accessible to you at this moment, *but if you find that you need help along the way*, or that getting there faster is more important than brute forcing it on your own, **I'm here**.

With my Signature 5D Coaching Framework I will walk with you step-by-step as we De-escalate the chaos, Diagnose opportunities, Design systems, Document processes, and Delegate effectively.

Imagine how different your life will be when your business works for you.

Go to **geoffwelch.com/discovery**
or scan the QR code below to learn more



Testimonials



Geoff helped me bring the long-term vision I have for my business into such focus that it feels inevitable.

I'm a list maker and his direction has allowed me to break down the vision into actionable and manageable tasks. He continues to support me as I shift my day-to-day habits and organizational systems to move me closer and closer to that vision.

Kelly Ward, CPA, CTC, CGMA, MBA

Owner, Kelly Ward, CPA



I was navigating a period of rapid growth in which we needed to add staff and formalize processes in my boutique yarn business, and **Geoff helped me gain clarity about how to prioritize my plans and take action on my goals.** That focus helped me get more done, with less wasted effort, and we are continuing to grow as a result!

Marcie Bourne

Owner, Bad Sheep Yarn



Geoff has been instrumental in helping me develop healthy boundaries in both my personal and professional lives while running an in-demand audiology practice. My desire to help as many patients as possible and ensure my staff is supported had led me down a path to burnout, but with Geoff's help I see new possibilities and recognize that my business needs to work for me, not the other way around.

Dr. Lily Hughes, AuD - *Owner, Aurora Audiology*

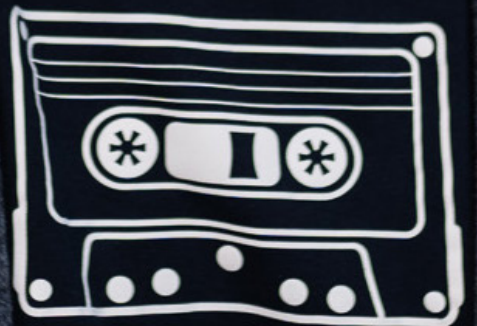


Geoff Welch

has owned Date Line Digital Printing in Fairbanks, Alaska for nearly 20-years, and has been helping small business owners across the country as a coach for a decade. His Signature 5D Framework is the foundation for helping these owners overcome overwhelm and make their businesses work for them.



GEOFF WELCH
CONSULTING



Start making your business work for you today!

geoffwelch.com/discovery