

# My Business Audit

Name:

Company Name:

Date of audit:



Created by: @thecelebrantmentor

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There are two parts to what you are doing, there is YOU, and YOUR BUSINESS. You need to audit both to make sure they are aligned.

First up is all about **YOU**.

**WHO ARE YOU?**

**WHERE ARE YOU?**

**YOUR WHY?**

**YOUR VALUES?**

**YOUR NEEDS & REQUIREMENTS?**

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## WHO ARE YOU?

Defining this so your messages on social media/website etc are accurate. It is pointless posting online or having imagery or wording on your website that says 'traditional' if you are 'alternative' for example.

Write down a few words that describe who you are (adjectives to summarise your personality – maybe ask a friend to do this for you too. Compare the results!

You'll feel clearer on who you are and when you do your business edit, you can check that you are correctly representing yourself.

**Write down who you are:**

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## WHERE ARE YOU?

Taking a step back to look at your current situation.

Everyone is in a different situation. Are you new, established, looking to do something different, starting a family, looking to retire? *Where are you in your life/celebrant career.*

Note this down as it helps to complete your snapshot

It sounds obvious but building a snapshot is crucial to then monitor any changes you make.

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## YOUR WHY?

Knowing what drives you will help to keep you on track. Working for yourself is hard (no doubt about it) so having written down what motivates you, what drives you NOW is key (this will no doubt change over time).

Add this to your snapshot – it is a record of your current situation, and when reviewed will be unique to you.

**THIS IS YOUR BUSINESS NOT ANYONE ELSE'S.**

This helps to ensure clarity, perspective, and a focus on moving forward (despite distractions), with YOUR driving factors in mind.

All of this will help you to now define your **values and morals**. These apply to you and your business and are essential

**Write down your WHY:**

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## YOUR VALUES?

Keeps you on track and helps when making tough decisions. In your time as a celebrant, there will be moments of uncertainty, feelings of failure, imposter syndrome, difficult venues, supplier egos and indeed tricky couples to deal with.

Knowing what your values are and having them visible at all times in your working space, will remind you of what you will and won't do/accept.

Bad behaviour, bullying/intimidation etc. Keep these visible – add them to your snapshot too. Noting down what brings you to life, and what makes you feel disdain will be different for us all, so be clear on what is acceptable and sits right with you.

**Write down your values/morals:**

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## YOUR NEEDS & REQUIREMENTS?

Similar to your WHY, but you'll need to define whether this is for business or pleasure (hobby) to be able to map out goals/plans.

Be honest about what you need, and what you want. You may want a relaxed lifestyle, **but** need to earn a certain amount.

Sometimes these don't look like they match up but there are then ways and means to change this and make it work.

It's ok to be honest about this. We all want or need different things. Social media portrays an image of super busy celebrants but their busy and yours, their success and yours will mean very different things.

AND THAT'S OK.

**Write down your needs and requirements:**

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Now we look at **YOUR BUSINESS.**

REVIEW YOUR SNAPSHOT ABOUT **YOU**

SECOND OPINION – **SANITY CHECK**

MAKE A **PLAN?**

**IMPLEMENT IT?**

REVIEW AND **REWARD?**

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## REVIEW THE SNAPSHOT OF YOU?

This will highlight any areas for consideration (if a new celebrant) or change (if an established celebrant).

It brings into focus what you need, now it's time to work out how to get it!

For example, if you are trying for a family and you need to be mindful of how many ceremonies you take, but still need to earn money then a cash flow and revenue stream discussion needs to be had.

**Write down any areas for consideration or change:**

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## SECOND OPINION – THE SANITY CHECK

A fresh set of eyes on what you are doing (or are about to do) is highly recommended. It must be someone that you trust.

Keep a list of action points and plan them into your diary/schedule. Schedule in a review before your next audit to review its success.

Remember: You need to take small steps to achieve bigger things.

**Write down any notes from this sanity check:**

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## MAKE A PLAN

Using all of your notes from the above, you can map out an action plan to help you move forward.

Be realistic, be honest, be prepared to push through to get going. It can be easy to procrastinate, but even baby steps are better than no steps at all where change is concerned.

Have an ideal milestone/target (get ten ceremonies, get ceremonies in a particular venue etc) and set smaller goals that you can tick them off when you've achieved them.

Achieving something that takes you towards your goal can be as simple as making a call, popping in to see a venue, or as daring as an exciting collaboration!

**Write down your targets:**

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# IMPLEMENT THE PLAN

This is the exciting bit. You get to take ACTION!

If you change nothing, then nothing changes. If you don't do something to change your situation, then it just won't change the way YOU want it to. Take control of YOUR business, do what you set out to do and feel proud of your PROGRESS. You are now moving in the right direction!

This is as much about a mindset shift as it is about auditing! Getting in the headspace ready to focus on what YOU are doing is crucial.

**Write down your first steps:**

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# REVIEW AND REWARD!

You need to do this so that you can measure your success! Success, as we know, is different for everyone, so keeping focussed on what YOU have achieved is vital to your progress.

Set a time aside in your diary to review what you set out to do and what you have done and decide how often you will do this. Perhaps a smaller monthly review, and then a 6 monthly audit again?

Take action to resolve issues, make adjustments, and most importantly, when you achieve something **REWARD YOURSELF!**

I am not sure how many of you do this, but without annual reviews or appraisals that you might get in an office job, you need to find a way of patting yourself on the back.

YOU are running your own business and that is no mean feat. If you are achieving what you set out to do, then this should be celebrated!

**Write down when and how often you will have a review or audit:**

**Write down how you will reward yourself!:**

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and that is no mean feat.

If you are achieving what you set out to do,

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## TOP TIPS:

- \* Be YOU. Don't be tempted to copy others. DON'T EMULATE, INNOVATE!!
- \* The internet is awash with celebrants all saying the same thing.  
**What can you do to be different?**
- \* It can be hard to stay focussed so if you feel overwhelmed or find that you are straying from YOUR plan and following a new shiny thing that someone else is doing, DON'T.
- \* Free yourself from distractions (forums, groups) and walk your own path. I cannot tell you how liberating it feels!
- \* Be happy for other people and their success but set about creating your own.

**Remember:** It is YOUR business, not anyone else's.

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## Sessions:

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Business Basics

Documents for your  
business

Writing/delivery analysis

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