

THE FIVE WEEK

SCALE

PLAN

5 STRATEGIES. 5 WEEKS.
5 HOURS. 5 EXERCISES.

Your Guide to
Creating Your
Ultimate Design
Practice



Glenn McHardie

Before you start...

What you're about to discover isn't just theory—it's the real deal.

These strategies propelled my Architect Practice to success, and they've been embraced by many Design Practice owners, like yourself, in our program. No need to reinvent the wheel, I've done the heavy lifting and laid out a step-by-step process for you.

You may be experiencing some of the following challenges within your Design Practice:

1. A Lack of clarity &/or confidence leading your Practice
2. Capturing &/or executing your business plan
3. Getting more, or better, projects
4. Dealing with Stop/Start workflow
5. Controlling your cashflow
6. Delivering projects on budget
7. Low level of Team engagement & involvement
8. Finding &/ or retaining key staff
9. Paying yourself more for the effort and risk

So I've written this guidebook to get you on the right track. To move away from the pain of the above challenges and toward your Ultimate Design Practice, with more growth, money and time-out.

In these pages, you'll encounter stories of Design Practice owners who faced challenges, likely similar to yours and conquered them. Their experiences prove that with the right level of focus and determination, even amidst tight schedules and challenging clients, decent growth isn't just a dream – it's a reality.

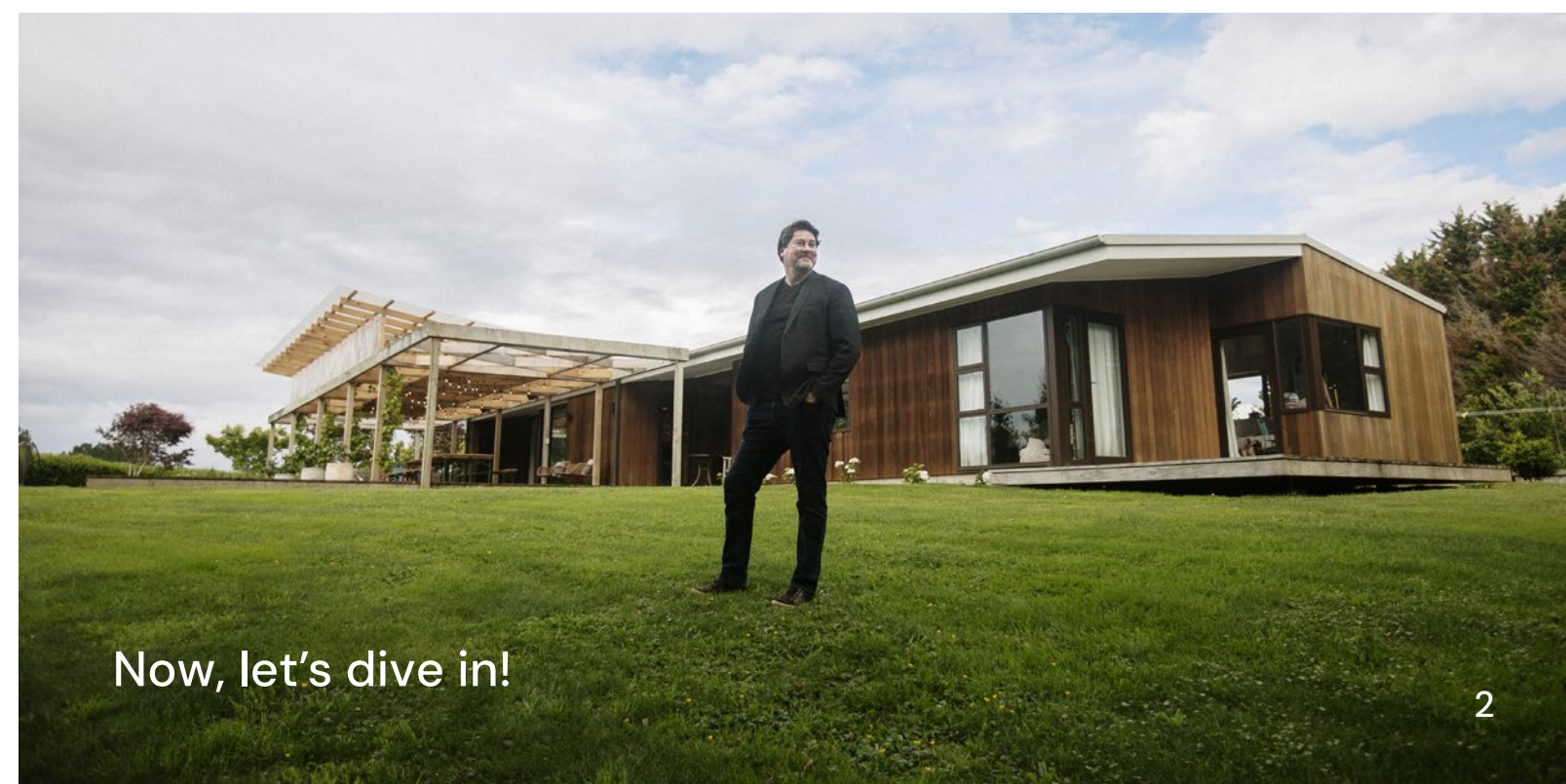
Consider it a quick read, a sneak peek into our Ultimate Design Practice (UDP) Program. To lighten the load, move quick, and be ok with capturing a draft of each exercise. Note that some of the exercises are simply a question. This is to spark your thinking, as it's often the question itself that leads to your solution. The guide is packed full of goodies, including a series of bonus workbooks that practice owners love.

GET THE MOST OUT OF THIS GUIDE...

1. One strategy per week
2. Get prepped...read the strategy at the start of week.
3. Be focused... turn off your phone and work solely on your strategy.
4. 1-hour ONLY... for each week
5. Momentum is KEY ...move quickly to complete the Exercises.

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Now, let's dive in!

01

Launch Your Plan

We want a clear vision for the direction of your business, fuelled by the right mindset and supported by a fitting plan!

Get the results you desire by building your planning muscle.

From Dreams, to Goals, to Plan to Action.

Have you captured your compelling Purpose...Your Why? Goals are Dreams with deadlines....

So, Dream BIG! By focusing on your LIFE PLAN first, supported by your business plan, allows you more time out/ flexibility from your business. BUT where do you start?

Learning is key to closing the gap between goal setting and quality planning. So, lets raise your learning and jump into the exercises in this guide!

TOP 3 IMPROVEMENTS

1. With a clear vision, raise your Clarity & Confidence to truly lead your Practice
2. Be the utmost best you can BE to grow your Practice
3. Create and execute your plan with ease, personal & business.



Download your Bonus Workbooks: Default Diary & Annual Plan Calendar @ facebook.com/groups/tbanetwork

Exercises:

#1 SET YOUR DIRECTION

We tend to way under estimate what we can achieve in 5 years. Go big here! Write down your 5 Year Goals – personal first, then business.

*TIP – To get insane clarity for your practice, capture your current and 5 year organisational chart.

#2 MINDSET FOR SUCCESS

Now, business is not just mechanics, it's also your psychology. Let's delve into the formula to Success (BE x DO = HAVE): Quality of your Clarity/ thoughts (1) & Confidence(2) [BE] x Commitment/Action(3) [DO] = your desired Success [HAVE]. Rate each then capture what would be the one tactic that would raise your rating.

#3 WEEKLY DEFAULT DIARY (refer workbook)

Personal Planning first...Think about a recent two week period that was typical for you, in business & personal; how did you utilise your time? Now, let's map out your ideal week... fill in your non-negotiables first! i.e. team meetings, productive hours, sales effort, family moments etc

#4 PRACTICE RITUALS

Let's make your rituals work for you. Start by mapping out your – meetings, team reviews, and even your training plan. This is your one page Annual Plan Calendar (refer workbook).

*TIP – involve your Team; as they will keep you on track.

#5 AREAS OF FOCUS

Commit to your Plan 'Areas of Focus'...try these for size, yet pick your own names: Financial, Admin/ Support, Marketing, Productivity, and Team Development. Goals kickstart Plans... now, for your next quarter, pick one key goal per 'Area of Focus'.

With all this focus on prior planning, you will set your Team and Practice on a clear and united pathway that will set you up for a level of ease of continuous growth.

CASE STUDY:

Effective Business Partnership Forms Solid foundation to Grow Business

Getting that healthy balance of business & personal life was a challenge.

My fiancé and I own a Building Compliance business. I found it hard to remove myself from business and switch into family mode outside of business hours. I was so busy dealing with the detailed technical process of reviewing the compliance of building projects, that I was neglecting my personal health and I struggled to be in a positive state which effected both work and home.

I knew I had to make some changes, and this was key to growth.

We met with Glenn and through his UDP Program we implemented some key tools, such as a Default diary, which helped me prioritise new weekly non-negotiable routines, including a few powerwalks to break up the day.

Planning effectiveness was dialled up with the use of the Annual Plan Calendar which captured all our key business rituals on the one page!

We locked in & mastered our monthly management meetings, so Amy and I could measure and report on the performance of our business.

The real lightbulb moment was when Glenn really drove home the growth principle formula of: BE (thoughts) x DO (actions) = HAVE (Results).

The UDP program gave us the absolute clarity of direction and confidence to build a solid foundation to grow our business.

Now, We've built this strong foundation for our business, thrived and expanded our business based on these principles and let me tell you, life's a whole lot better now!"

- Dan & Amy C3 BUILDING COMPLIANCE



02

Promote Your Practice

Let the best fitting projects into your Practice, have a simple plan with the right mix of marketing strategies and be of deep service to your clients.

By clearly defining your target market, you can pre-qualify projects as on/off-target before you let them into your Practice. By sharpening your niche, you will get to be in a position of less price competition, resulting in more joy & money for the practice. Many practices' have a 'here's hoping' approach to confirming work rather than an ideal place of service approach of 'professionally help people buy their services'.

Becoming a Practice Professional means, you have a well-tuned sales process to influence prospects accepting your recommendations.

TOP 3 IMPROVEMENTS:

1. Rewarding projects with enjoyable clients from repeats & referrals.
2. A strong business foundation with a robust one pager marketing plan.
3. Grow your sales conviction, coming from a client centric place of service.



Download your Bonus Workbooks: Target Analyser & Profit Levers @ facebook.com/groups/tbanetwork

Exercises:

#1 IDEAL CLIENT

Think of your best clients, the ones that; value your ideas, pay good fees, pay on time & are enjoyable to work with. What about your worst clients?. Now flesh out your criteria to rate clients A,B,C,D.

*TIP – moving forward, STOP letting in Ds.

#2 ONE PAGER PLAN

See each marketing tactic as a leg supporting a table top; your business. How stable are you? Now, capture your ONE page plan...a simple table with a row per 'leg'/ tactic. Some examples: networking, website, social media, tenders, signage etc.

#3 NURTURE RELATIONSHIPS

Ensure you keep the tap on with nurturing client relationships... they are your biggest asset! Do you have a Referral system? A Networking plan? A Strategic Alliances plan?

*TIP – Consistently put energy into nurturing your current client relationships.

#4 WEBSITE FOCUS

Rate your current Website, from; 1 = intense focus on you/ your architectural gems through to 10 = deeply client centric/ communicating their benefits?

*TIP – get say 3 x top clients to provide feedback on your website.

#5 TESTIMONIALS CAPTURE

Name three clients you would love to get testimonials from. Try this process – simply chat, openly question, listen intently, capture their feedback. Make it easy for clients and email back what you heard, then get consent to use it in your marketing.

Now, go out there and embrace your niche and new found marketing stability & watch your business thrive!

CASE STUDY:

Client Centric focus leads to fundamental shift to Practice Success!

The program really helped to identified Sales & Marketing as being one of our weakest links... we ended up changing our whole approach!

We were so reliant on word of mouth, with an inconsistent drip feed of leads through the door. With the program, a year later now, we have strengthened our "top of funnel" leads, by adding tactics such as attending trade shows and investing in our online presence, including updating our website. Sales have really shifted, from us being more active in following up leads and getting better at recording existing clients' details.

There has also been a massive shift in how we sell, well actually serve.

Now, we slow down, effectively listen to what our clients want and need, and how they feel, vs. simply bombarding them with all this information about what we do. Clients are way more engaging, more willing to tell us their story, which puts us in a place of being able to serve them better.

Now, our practice is truly client centric, and this approach has rippled throughout, from how we promote through to how our team deliver our clients projects.

And our team, wow what a shift with the program, with improvements including; having clear role descriptions, giving our senior guys more responsibility, implementation of key delivery processes along with fleshing out our organisational chart. Our Team is now really thriving with our new client project delivery system in place.

But the biggest payback from the Program was in terms of my growth as a as a business owner; with the depth of learning, I feel can take these principles with me over the next 10 years or so in business – which is priceless!

I wish I did the Program 10 years ago!!

- *Daniel* CULLEN KEISER ARCHITECTURE

03

Master Your Financials

Be a master of Financials, with a set budget, KPIs measured monthly, a pricing system in place, focused margin optimisation, and cash flow management.

Accurate scorekeeping is crucial for improving production and financial outputs. Having a strong understanding of how to negotiate pricing for each project, while also managing the corresponding costs, is key to optimising margins.

Your cashflow is your business reality!

With cash flows both in and out of your Practice being a function of timing. Rest easy, with the use of financial forecasting and budgeting procedures allow you to accurately predict how your bank account is tracking towards its targets.

TOP 3 IMPROVEMENTS:

1. Have a well-prepared budget, where you are prepared for any future challenges.
2. Have Gross Margin mastery, leading to a truly effective & enjoyable practice!
3. Rest easy at night being in control of your cash position.



Download your Bonus Workbooks: The Practice Dashboard & The Margin Optimiser @ [facebook.com/groups/tbanetwork](https://www.facebook.com/groups/tbanetwork)

Exercises:

#1 MASTER BUDGETING

Got a current Budget? Get curious. Ratios tell you stories; compare the previous 3 years & look for trends. How has your production salaries, as a ratio of total sales, trended? Look at each cost line as a ratio of your total sales figure.

#2 THE PRACTICE DASHBOARD (refer workbook)

Without a Dashboard, you would be driving blind! Are you reviewing at your monthly management meeting? Measure your KPIs; financial performance, cash flow, productivity, and marketing & sales efforts. .

#3 REVIEW PRICING SYSTEM -

Is your pricing aligned with the value you offer? Dive in and back cost a recent project to measure your performance reality!. Gain insights here for fine-tuning your pricing system.

*TIP – Regularly review prices....ask, where can I raise NOW?

#4 GROSS MARGIN MASTERY

First, ensure accuracy of Gross Margin by ensuring your production team salaries are included as a Cost of Sales. Now for the killer tactic – evaluate Gross Margin by project type (refer Workbook), ensuring none underperform.

#5 CASH FLOW FORECAST

Turnover is Vanity, Profit is Sanity, and Cash is your business Reality!! Is your Cashflow Forecast reviewed regularly? Forecast 3 months out: what is your minimum agreed cash balance, and measure your liquidity...are you trading solvent?

By investing in financial mastery, you'll insanely raise your confidence level and ability to make effective decisions as you grow your Practice!

04

Streamline Project Delivery

Let's achieve seamless project delivery, where projects flow effortlessly from inception to completion, avoiding missed deadlines and any chaos.

To unleash the full potential of your Team it's crucial for the Practice to implement systematic processes, beginning with the most routine tasks. The objective is to transition from a reliance on individual knowledge, where processes are confined to a select few, to being more streamlined and automated. This transformation guarantees uniformity while freeing up capacities, empowering your Team to excel in finding creative solutions and strategic initiatives.

TOP 3 IMPROVEMENTS:

1. Automate manual tasks, saving valuable time.
2. Projects delivered consistently on time & budget.
3. Raving Fan Clients due to ease of project delivery, with all systems improvements being central to them!



Download your Bonus Workbooks: Minimum Service Standards @ facebook.com/groups/tbanetwork

Exercises:

#1 CLIENT SERVICE GUIDE

Note down how you would: 1) Make it easier for your Client to buy, 2) Raise your service level...make them smile, 3) Optimise delivery on time, as promised, & 4) Raise Quality. These are your 4 Minimum Service Standards (refer Workbook)

#2 MAP PROJECT WORKFLOW

Get visual! Sketch out every step of your project journey, from the initial briefing session to celebrating Project Completion with your client. Include client touchpoints and a process to sign-off at stages.

*TIP – Capture your "Key Routine List"....one page only.

#3 WEEKLY CLIENT UPDATE

Bid farewell to radio silence with timely client updates and milestone notifications. Add a "close of week update email" ritual, ensure you include the full project team, internal & external.

#4 TRACK PROGRESS EFFECTIVELY

With project tracking, real-time insights help you spot roadblocks early and make informed decisions. Ask yourself; how would you rate your use of project management tools & technology to monitor project progress?

#5 CONTINUOUS IMPROVEMENT

Review a recent project. Try LB/NT... ask; "What did we Like Best" (LB), then, "What would we do differently Next Time (NT)?" Use insights to refine your processes.

*TIP – Ensure Systems improvements actually enhance your client's experience.

Once implemented, watch the time you save and the errors you eliminate, raising enjoyment & helping propel your business forward.

CASE STUDY:

PROUD as punch for growing practice with tripling team size in his practice in only a few months

The Program gave me the confidence to grow my Architectural Practice 3 times in only a few months!

I struggled with how to grow my Practice, focusing on theDesign, as well as answering queries from my Production Team, who worked remotely, and handling queries from a few clients, which all took up too much of my time. I knew this needed to change.

Then, enter Glenn and his program.

Suddenly, my goal of a thriving Practice was now a reality.

He helped me step into my identity as a business owner and leader, creating a realistic and clear plan that I could use immediately.

He trained me on how to recruit and onboard the ideal fitting team player/s, built systems with an early focus on financial reporting that allowed my Team to grow and made me step up with my 'on-business' focus, including Financials & Marketing.

I feel so empowered, as having these systems in place allows me to be a better business leader, with a growing team and a business which supports this continued growth.

-Nick FORTYONE ARCHITECTURE

05

Grow Your Team

Focus on: leadership, upholding values, your training plan, reviewing your Team, and celebrating achievements.

Your Practice Culture starts with YOU, being a function of active leadership.

To unite your Team, you must identify and articulate the values that reflect your ultimate practice environment.

This translates to the way your Team serve clients as well as how the team collaborate. To attract and retain the right fit of team players you need a recruitment system backed by a quality onboarding system and all followed up with an ongoing training plan.

To develop high performers requires consistent effort, including actively mapping and tracking progress.

TOP 3 IMPROVEMENTS:

1. Get your team on the same page & truly want to be part of the Practices' success!
2. Enhanced team productivity and synergy with clearly defined roles.
3. Improved employee satisfaction and retention due to growth opportunities.



Download your Bonus Workbooks: Team Alignment @ [facebook.com/groups/tbanetwork](https://www.facebook.com/groups/tbanetwork)

Exercises:

#1 ALIGN YOUR TEAM

Is your Team on the same page? Do you have a proven process to capture your Team's ideas/ suggestions and addressing issues, with the ability to apply to your plan? *TIP - Try the Team Alignment (refer Workbook)

#2 VALUES CAPTURE

Your values are what your 'Tribe' see as important; 3 to 6 will do. Think of the wins for the client, the wins for the team, and the wins for the owner/ business.

#3 INVEST IN TRAINING

Create a training matrix to understand the business' & your team's specific training needs, include repeat training of your fundamental skills...list these out now.

#4 CLEARLY DEFINED ROLES

If all your Team captured their understanding of their role on one page and handed them in at the close of the week, after reading, would you be in tears or elated? *TIP - Bring Role Descriptions to life vs left dormant in employment agreements.

#5 CELEBRATE ACHIEVEMENTS

Have some fun... e.g. Ring a bell when you get a significant project milestone, like getting Building Consent....What is one thing you could add/ do?

By investing in your Team's growth, you'll nurture a strong, united practice that will truly propel your business to new heights!

CASE STUDY:

350% increase in Profit over 5 years with a 9-Week Europe Trip with young family

Yes, that's what happened! I was a co-owner, Architect of a Design Practice, and we experienced sustained growth, with a consistent monthly dividend giving me the ability to invest heavily in property, creating true Freedom, which included 9 weeks in France with my family!

It wasn't always like that. Early in the business, we struggled. Getting all owners on the same page, which really affected the business being able to perform at optimal level. Marketing was not valued, and we were rather people dependant with a lack of solid procedures in place if they were absent. We were so busy fighting fires with project issues that we weren't putting in the energy required to growing our Practice so as to be less reliant on the Owners...

Taking the principles that now form the basis of the UDP Program, firstly, we got really aligned, with all the Owners agreeing to a 5-year plan. Then we really ramped up our mastery of Governance vs Management, including non-negotiable monthly management & quarterly board meetings.

We truly aligned the Team, capturing our agreed purpose and values, really ramping up our systems and training...all so we were less reliant on a few people. The results were outstanding!

Profit reached a truly Industry leading 27.5%... being a 350% increase over a 5-year period. Turnover was up 250% & our team grew from 20 to 33!

We had a totally new perspective on business, where the Owners could still be very smart Designers AND have the focus and confidence to be great business leaders! I've been where you are. I understand the struggle. But trust me, with the right mindset and the right strategies, you can turn your business into a success story just like mine.

This is my story: I get you.

Glenn

Where from here...

Congrats on delving into the potential of your Design Practice by completing the exercises in this guidebook! Now, it's time to find out more...



Go to <https://thebusinessarchitect.co/master-class/> to find out when our next 3-session Ultimate Design Practice Masterclass is running.

In our FREE Masterclass, you'll discover how to bring into your Practice the most rewarding projects, how to work on these projects through designing systems and developing your team, and how to get those projects out the door, paying yourself industry leading profit.

Remember, the Design Practice owners you've read about here are real people with real businesses just like yours. They faced similar challenges — tight project deadlines, tricky clients, and undervalued work.

HOWEVER...

They decided to do something about it, being proactive business owners, and started a journey of gaining absolute clarity and confidence to improve their practice through the Ultimate Design Practice (UDP) Program. Leading to; rewarding projects, a strong team, industry-leading profits, and the freedom to enjoy life—all while keeping their passion for design.

For a sneak peek at the program, visit <https://thebusinessarchitect.co/program/>

If improving the capability and happiness of your staff, clients, yourself and family is important to you, participation in the UDP programme is The Way Forward!

My sincere hope is that you'll embark on this journey to create Your Ultimate Design Practice!

I look forward to meeting you, as you seek to grow!

I'm an Architect, I'm a Design Practice growth expert...I get YOU.

Warm regards,



Glenn McHardie

