

A WORKBOOK

The Learning-Based Business *Plan*

Create a plan to align your course development goals with your overall business strategy for long-term success.

Why the blank space is the *point*

You've just opened a workbook that is, in places, mostly empty. Let me tell you why.

I've spent my career designing learning: for companies, for coaches, for people with real expertise and no idea how to package it. Nobody has ever built a profitable course out of information handed to them. They build it out of what they already know, once they can finally see it laid out in front of them.

That's what these pages are for. Not to teach you course design, but to get the thing that's been circling in your head for a year out where you can look at it. Most people find they already have the course. They just have it in eleven places at once: an onboarding email, a talk they've given four times, a checklist they keep pasting into messages.

The questions are the ones I ask in a session, in the order I ask them. A few are uncomfortable. *How will a profitable course change your life?* is not a business question, and it's the one that most often changes what somebody builds.

Clients who've come through this work have accredited their programs through ICF and licensed them to Fortune 100 companies. But the pattern I trust most is plainer: every client of mine who actually finishes is profitable. Finishing is the whole trick, and a pilot with a date on it is how you force the finish.

So before you turn the page: clear an hour nobody else has a claim on. Go to the spot where your good ideas tend to show up. The porch, the corner booth, the chair by the window with the bad lamp. Bring the beverage of your choice, plus your best pen if you're going analog. The one you don't let people borrow. Then write in it, badly and out of order. The messy version is the useful one.

— Jeannie

JEANNIE SULLIVAN · JEANNIESULLIVAN.COM

BEFORE WE BEGIN

Revenue Roadmap

Let's get clear on the steps to profitability.



The Learning-Based Business Plan is the first of three simple steps to creating a profitable learning-based revenue stream in your business.

THREE STEPS

I Design your course

Map out the strategic benefits of integrating learning-based revenue into your overall business strategy. You'll use the Course Design Canvas to get clear on your ideal learner, transformation target, and long-term vision.

2 Host a profitable pilot program

Demonstrate early outcomes by offering a beta version of your course to paid participants at a discounted price. You'll create a rapid development strategy to fund your course project and see measurable results.

3 Create course advocates

Fuel your course funnel by focusing on the Learner Journey to create a consistent stream of referrals. By the end of your profitable pilot, you'll have data to prove your program and positive testimonials.

START HERE

The Course Design *Canvas*

The Course Design Canvas is a one-page planning template. It's designed to create a snapshot of your learning-based revenue idea, distill the essence of your course, and break it down into key elements.

Read the guiding questions on the next page, then try answering them on the blank canvas that follows.

Course Design Canvas

GUIDING QUESTIONS

ZONE OF GENIUS

What are you equipped to help others master?

PERSONAL OUTCOME

How will a profitable course change your life?

COURSE CREATION STYLE

How do you enjoy creating and working?

IDEAL LEARNER

Who is your learner? How will you motivate them? What are their barriers to success?

CONTENT CURATION

What existing content do you have to include in your course?

DELIVERY FORMAT

How do you want to share content with learners?

PILOT PROGRAM

What's your measurable outcome? Target number of learners?

GROWTH INITIATIVES

What are your short and long term revenue goals?

TRANSFORMATION TARGET

When learners finish, what will they be able to do that they couldn't do before?

SIGNATURE PROCESS

The 5 to 7 named steps of your method, not your module list.

Course Design Canvas

YOUR TURN

ZONE OF GENIUS

PERSONAL OUTCOME

COURSE CREATION STYLE

IDEAL LEARNER

CONTENT CURATION

DELIVERY FORMAT

PILOT PROGRAM

GROWTH INITIATIVES

TRANSFORMATION TARGET

SIGNATURE PROCESS: 5 TO 7 STEPS

_____	_____	_____	_____
_____	_____	_____	

Zone of Genius

Where are your unique abilities? What's your special sauce? What are you known for?

FOR INSTANCE

Turning a messy spreadsheet into a story a board can act on

Getting a nervous speaker through their first keynote

Pricing creative work without apologizing for it

Stuck here? Lay your own path out in order at **[lifestrip.bio](#)**, then come back. The pivots you would apologize for are usually the answer to this box.

Personal Outcome

How might your life be different with a steady learning-based revenue stream?

FOR INSTANCE

School pickup three days a week instead of one

Saying no to the client who drains me

One income stream that doesn't depend on my calendar

Transformation Target

What will your participants be able to do after learning with you, that they couldn't do before?

FOR INSTANCE

Write and send a proposal in an afternoon, not a week

Run a workshop without reading from a script

Read their own numbers and know what to change

Course Creation Style

How do you like to work? How do you like to learn? And what keeps you stuck?

FOR INSTANCE

I need a deadline and someone expecting me

I think out loud; writing alone stalls me

I'll happily build the slides and avoid the sales page for months

Content Curation

You have course content hidden in your business. Let's find it.

FOR INSTANCE

The onboarding email I rewrite for every client

A conference talk I've given four times

The checklist I keep pasting into messages

Ideal Learner

Think of three to five past clients or current contacts who would be a perfect fit for your course.

FOR INSTANCE

The florist who wants to stop trading hours for dollars

The consultant whose referrals quietly dried up

The coach with a full practice and no time to grow it

Pilot Program

What would it take for you to run a profitable beta test and get early results?

FOR INSTANCE

Six paying people at half price, starting in September

Four weeks, live, nothing pre-recorded

One measurable result I can say out loud

Delivery Format

How will you get information to your learners?

What platform will you use for community?

FOR INSTANCE

Zoom plus a shared doc, nothing fancier yet

One email lesson a week, replies come straight to me

The group space my clients are already in

Signature Process

What five to seven steps must your learners take to achieve the transformation target?

This is your method: the named steps you are known for, the ones you would sketch on a napkin. It is not the module list. Modules are how you teach the method later, and there are usually more of them.

FOR INSTANCE

Name it → Price it → Pitch it → Deliver it → Prove it

Audit → Clear out → Rebuild → Maintain

Gather → Draft → Test with one person → Revise → Open it up

I _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

Growth Initiatives

Where do you see your learning-based business in three years? How about ten?

FOR INSTANCE

Year three: the course pays for the first hire

Year three: two cohorts a year, and I don't run both

Year ten: licensed to associations, and I teach the trainers

PART TWO

Helpful tools + resources

As you fill out your plan, these may help. You'll find explanations, frameworks, and a learner persona template to guide your decisions.

TOOL ONE

Course Creation Style

Knowing how you prefer to design content is essential to actually finishing.



Not all creatives approach a project the same way, with the same tools, or the same thought process. In my work with course designers, I've come to recognize three distinct styles of creation.

Three styles of creation

Focused Finisher

Loves a project plan, checklists, and completing tasks. Dives into new technology without hesitation and is a self-starter.

Detail oriented

Loves finishing

Self-starter

Mixed Media Maverick

Gets excited about new tools and technology, and also enjoys connecting with small groups of people. Follows a schedule and a project plan reasonably well.

Enjoys new tools

Loves connecting online

Workshop Wonder

Shines in front of a room, online or in person. Loves being in the flow of teaching and sharing their genius, and needs little prep to present.

Thrives live

Loves teaching

Four delivery formats

Pick the one that matches how you like to work, not the one that sounds most impressive.

Live, online modules

If writing scripts and building dozens of worksheets makes you want to hide, this is likely your model. One of the best options for piloting and getting measurable outcomes.

**GREAT FOR EXPERTS · QUICK
TURNAROUND**

Live, online workshop

If your outcomes can be reached in a day or a half day, gather learners online for a fully interactive session that combines presentation and working time.

**EXPEDITED RESULTS · BOOSTS
COMPLETION**

Digital + accelerator

Adding an accelerator to a digital evergreen program adds interaction, lifts completion rates, and creates raving fans. Content stays digital; learners get group access to you.

**INCREASES ENGAGEMENT · CREATES
URGENCY**

Digital + evergreen

The closest of these to a passive revenue stream. Typically sold directly through ads or an email sequence, usually for less than \$300.

ALWAYS AVAILABLE · 100% ONLINE

TOOL TWO

Get to know your *learner*

First, get to know the Learner's Journey. Then create two or three learner personas that fit the profile of someone who would travel all the way through it and successfully fuel your funnel in the future.

The Learner's Journey

When you focus on your learner's journey, your course funnel fuels itself.

One of the biggest barriers to creating learning-based revenue is a resistance to selling online. But when your course supports your overall business strategy and consistently gets results, your funnel fuels itself.

1 **CONNECTIONS**

When your learning-based strategy is aligned to support your overall business goals, connections come naturally.

2 **INVITEES**

As you meet people who may be a good fit for your program, extend a personal invitation to explore possibilities.

3 **LEARNERS**

Engage your learners to support their outcomes, measure progress, and encourage course completion.

4 **ADVOCATES**

Celebrate learner success and cultivate an alumni group to fuel your course funnel and bring in referrals.

FRAMEWORK

Learner Personas

Develop deep insights about your learners.

Learner personas are semi-fictional representations of your target participants. Two to three are ideal, and the more detailed the better. Use the blank framework on the following pages to start filling out yours.

Learner Persona

GUIDING QUESTIONS

DEMOGRAPHICS

What do you know about their age, gender, income, and interests?

MOTIVATION

Why are they interested in transformation now?

BEST POSSIBLE OUTCOME

What would make this investment 100% worthwhile for them?

OTHER COURSES

What other courses will they have taken?

ONLINE COMMUNITIES

Where do they hang out online?

COMPETING PRIORITIES

What competes for their time, attention, and money?

FRUSTRATION

What keeps them up at night?

CONFIDENCE BOOST

What makes them feel like a rockstar?

YEAH, BUT...

What false beliefs do they hold?

Learner Persona

YOUR TURN

PERSONA NAME _____

DEMOGRAPHICS

MOTIVATION

BEST POSSIBLE OUTCOME

OTHER COURSES

ONLINE COMMUNITIES

COMPETING PRIORITIES

FRUSTRATION

CONFIDENCE BOOST

YEAH, BUT...

TOOL THREE

Getting *results*

As a course designer, your job is to inspire change and drive results for every participant. These simple shifts in design encourage the action required to see results, and motivate learners to finish.

Shorten the learning CURVE

Five design shifts that get your participants to measurable outcomes faster.

C

CONFIDENCE

Help your participant gather the courage they need to take action by boosting their confidence with storytelling.

U

UNDERSTANDING

Give them just enough to understand and take the next action step in the process.

R

RESISTANCE

Know where your learners will struggle, and give them strategies to overcome those barriers.

V

VISION

Learners may lose sight of their ultimate goal when they meet the inevitable frustrations of learning something new. Help them reconnect with their vision.

E

EVALUATION

How will you help your learners evaluate their success? Can you integrate a learner scorecard into your program?

The Learner Scorecard

Three things worth measuring, and what each one earns you.

Outcomes

Create a process for learners to document their activities and track measurable outcomes. This creates accountability and lets you prove your program is effective.

Engagement

Provide a platform for sharing successes, asking questions, and getting help. Let learners build a sense of community among themselves to foster alumni relationships.

Completion

With typical course completion rates as low as 10%, simply tracking this measure demonstrates your commitment to results and motivates learners to cross the finish line.

WHAT COMES AFTER

Growth *initiatives*

Your learning-based revenue stream will keep producing profitable opportunities. The possibilities are genuinely wide open when it comes to scaling.

My clients have accredited their programs through ICF and licensed them to Fortune 100 companies for multiple six-figure contracts.

Six rungs, in order

100% of my clients who actually finish their programs are profitable.

Scheduling a pilot is a great way to force the finish.

I **Host your profitable pilot program.**

Prove the results with paid participants before you build the whole thing.

2 **Consistently bring in new participants.**

Once you've proven your results, make your program readily available for eager participants.

3 **Establish mentorship programs.**

Keep alumni engaged with mentorship and affiliate options so they keep learning and referring.

4 **Launch a certification component.**

Learners appreciate the added instructional integrity, and may earn continuing education credits for participating.

5 **Create a train-the-trainer program.**

Other coaches and consultants may see your successful program as a pathway to growing their own practice.

6 **License your program to organizations.**

Many corporations want fresh training options. Licensing your curriculum establishes ongoing revenue.

Rungs four through six are their own body of work: certification, licensing, and training other people to teach your material. That's a longer conversation, and one I'm glad to have when you get there.

Quick recap

These tools can help you design a plan to sustainably integrate learning options into your successful business.

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FIFTEEN MINUTES

Let's have *coffee.*

Bring your plan as it is. Half-formed is the normal state of a good idea. Fifteen minutes, no agenda beyond the one you bring.

jeanniesullivan.com/coffee