Lesson Scripts Module 0: Welcome & Course Setup

Hook: Welcome to Module 0: Welcome & Course Setup. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Retirement Reinvented: Setting Up for Success

Module Overview: Introduce the course purpose, differences between the Mastery and Essentials tracks, and expectations. Emphasize that success comes through consistent action and honest reflection. Learners prepare a quiet workspace, gather recent bank statements and bills, obtain scratch paper and pens, and print out worksheets. Highlight that Mastery requires five sessions per week (with two catch-up days) over eight weeks, while Essentials compresses the journey into ten hours. The guiding slogan is “Give us an hour a day, and we’ll give you the launching pad for your business.”

Lessons & Activities:

Lesson 0.1 – Course Orientation: Explain objectives, materials, timeline and differences between Mastery (long course) and Essentials (short course). Learners commit to the course schedule and identify supportive family members.

Lesson 0.2 – Mindset Preparation: Discuss why retirees start businesses (purpose, boredom relief, supplemental income). Encourage learners to adopt a growth mindset and prepare for periods of uncertainty.

Assignment/Action Step: Set up a dedicated workspace, print all worksheets and schedule study blocks on a calendar.

Estimated Completion Time: 30 minutes.

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 1: Discovering Your Foundation, we will continue building on these ideas.

Module 1: Discovering Your Foundation

Hook: Welcome to Module 1: Discovering Your Foundation. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Knowing Yourself: Your Foundation & Decision-Making

Module Overview: Participants examine the internal “your foundation” that drive their behaviour—attitudes, beliefs, motivations and key people. Understanding these settings helps determine whether entrepreneurship suits them and reveals adjustments needed for success. The module integrates Essentials Exercise One in full.

Lessons & Activities:

Lesson 1.1 – Discover What Drives Your Decision-Making Key Talking Points: Explain “your foundation” as manufacturer settings for computers that remain until changed. Decisions reveal what truly matters; influences include family opinions, finances, preferences, environment, religious faith, peer pressure and future worries. Use analogies such as selecting a new car. Activity: What Drives My Decisions – List at least twenty-one influences on important decisions, cross out the five least influential, then highlight the seven most important and circle the top three. Journal Prompt: Reflect on the three top influences and what they reveal about personal wiring. Time: ~60 minutes.

Lesson 1.2 – Define Your Foundation Key Talking Points: Your foundation consist of attitudes (optimistic/pessimistic), beliefs (faith in God, trust in institutions), motivations (family, success, revenge, health), and people (family, spouse, mentors). Stress that these settings emerge under pressure. Activity: My Foundation – List five attitudes, five beliefs, five motivations and at least five people that shape everyday life. Journal Prompt: Identify which settings are visible or hidden to others and whether to reveal or conceal them. Time: ~45 minutes.

Lesson 1.3 – Determine the Positives and Negatives of Your Foundation Key Talking Points: Every default setting has benefits and drawbacks (e.g., pessimism breeds caution; optimism can blind one to risks; a 9-to-5 work ethic instils consistency; altruistic motivations may be tested by selfish behaviour of others). Activity: Positives & Negatives – For each category (attitudes, beliefs, motivations, people), list at least three positives and three negatives. Journal Prompt: Note which positives and negatives help or hinder you the most. Time: ~60 minutes.

Lesson 1.4 – Refine Your Foundation Key Talking Points: Your foundation can change over time. Attitudes and motivations shift as life priorities evolve (e.g., teenage car dreams vs. retiree family focus). Emphasize changing internal settings before altering relationships. Share personal anecdotes (insert a Chaz story here) to illustrate. Activity: Refining My Foundation – Based on positives and negatives, select five desired attitudes, five beliefs, five motivations and five people for your updated foundation; mark any changes from your original list. Journal Prompt: Explain why you made these changes and analyse their positive and negative implications. Time: ~60 minutes.

Lesson 1.5 – Determine Whether Running Your Own Business Resonates with Your Foundation Key Talking Points: Entrepreneurship is not for everyone. An honest self-assessment can prevent wasted money and heartache. Chaz recounts walking away from ventures when timing wasn’t right. Some retirees may find greater fulfilment in non-business roles (parent, volunteer). Activity: Will My Foundation Support My Business? – Evaluate whether your attitudes, beliefs, motivations and primary people support a personal business. Answer questions about helpfulness/harmfulness of attitudes, alignment of beliefs with success, resilience of motivations, and encouragement from key people. Journal Prompt: If the answer is “no,” decide whether to change expectations or strengthen settings. If “yes,” describe the support you expect from each category. Time: ~60–90 minutes.

Assignment/Action Step: Decide whether to pursue entrepreneurship now. If yes, commit to the remaining modules; if no, set personal development goals and revisit later.

Estimated Module Completion Time: 5–7 hours (Mastery) or ~1 hour (Essentials Exercise One).

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 2: Big Pictures, we will continue building on these ideas.

Module 2: Big Pictures

Hook: Welcome to Module 2: Big Pictures. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Creating Vision: Big Pictures for Life and Business

Module Overview: Learners construct “big pictures” for their life and business, identifying external elements (people, activities, roles, flavours, colours and sounds) and ensuring business occupies an appropriate place within life’s larger canvas. Participants set specific objectives and due dates to guide their business picture. The module includes Essentials Exercise Two.

Lessons & Activities:

Lesson 2.1 – Identify Elements of Your Life’s Big Picture Key Talking Points: Distinguish internal your foundation (mostly invisible) from external big picture elements (visible). Big picture elements include supportive and negative people, daily activities, hobbies, and roles. Activity: What Makes Up My Big Picture – List at least twelve people (individuals and groups), twelve activities and seven roles that compose your life. Journal Prompt: Consider which elements deserve greater or lesser attention; sketch a rough diagram. Note whether “business owner” appears among roles and why. Time: ~60 minutes.

Lesson 2.2 – Add Flavours, Colours and Sounds to Your Big Picture Key Talking Points: Use sensory metaphors to deepen understanding: flavours (spicy, bland, sweet, bitter) reflect emotional tone; colours (bright, royal, natural, technological) indicate energy and focus; sounds (music, noise, quiet, voices) evoke environment. Encourage retirees to think creatively. Activity: Flavours, Colours and Sounds for My Big Picture – List three current flavours and their “taste,” three desired flavours and their effect, two current colours and a descriptive word, two desired colours and a word, three current sounds and their effect, and three desired sounds and their desired effect. Journal Prompt: Craft a one-sentence description of your life’s big picture and outline how you will keep or change flavours, colours and sounds. Time: ~45 minutes.

Lesson 2.3 – Put Together the Big Picture for Your Business Key Talking Points: Business is a picture within the larger life picture; if it becomes the entire canvas, health and relationships suffer. Discuss business-specific people (partners, employees), activities (operations, sales, marketing), roles (accountant, salesperson, researcher, boss), and flavours/colours/sounds. Share a Chaz anecdote about balancing business and life. Activity: The Big Picture for My Business – For each category (people, activities, roles, flavours, colours, sounds) list items in two columns: As It Is and As I Want It To Be. Journal Prompt: Write a brief description of your current and desired business pictures. Identify positives and negatives and what improvements could bring positive results. Time: ~60 minutes.

Lesson 2.4 – Write Five Specific Objectives for Your Business Key Talking Points: Effective objectives include a specific target, specific behaviour, and specific responsible person(s). Corporate boardrooms often draft vague objectives; avoid that trap by being explicit. Use the sample: “Objective: My business will make an extra $15,000 through five additional sales calls each week by my senior sales person and myself.” Activity: Five Business Objectives – Based on your desired business picture, write five objectives following the target–behaviour–people format. Journal Prompt: Explain how each objective will influence people, activities, roles, flavours, colours and sounds in your business picture. Time: ~60 minutes.

Lesson 2.5 – Assign Due Dates to Your Objectives Key Talking Points: Deadlines convert objectives into commitments. They should be realistic and staggered according to priority and ease of implementation. Without due dates, objectives lose momentum. Activity: Objectives with Due Dates – Assign a due date to each objective (e.g., one by the end of the quarter, another in six months). Journal Prompt: Anticipate when you expect to see changes in your business picture and describe those changes. Time: ~60 minutes.

Assignment/Action Step: Share your life and business pictures and objectives with a trusted friend or mentor for accountability.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Two).

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 3: Time Management, we will continue building on these ideas.

Module 3: Time Management

Hook: Welcome to Module 3: Time Management. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Mastering Your Schedule: Make Time Work for You

Module Overview: Time management ensures retirees can balance business development with family, health and recreation. This module teaches learners to audit their current schedule, prioritise activities aligned with your foundation and big picture goals, eliminate time-wasting habits, commit to business and personal time blocks, and rewrite a realistic weekly schedule. The module integrates Essentials Exercise Three.

Lessons & Activities:

Lesson 3.1 – Write Out Your Present Schedule Key Talking Points: A clear baseline of how time is currently spent is vital before making changes. Activity: My Weekly Schedule, First Draft – Use a blank weekly grid (Sunday–Saturday, 24-hour slots) to note work, family, personal time, sleep, spiritual development, recreation, education, hobbies and meals. Journal Prompt: Compare hours spent working to hours spent resting or with family; identify categories requiring more balance. Time: ~60 minutes.

Lesson 3.2 – Identify Your Foundation and Big Picture Elements to Include Key Talking Points: Many retirees leave jobs because schedules ignored their your foundation. Now is the chance to align your schedule with your core values and priorities. Activity: Top Three Foundation and Big Picture Goals – Choose three your foundation (from Module 1) and three big picture elements (from Module 2) that must be honoured in your schedule. Journal Prompt: Evaluate whether focusing solely on these six items would simplify or complicate your schedule. Time: ~45 minutes.

Lesson 3.3 – Eliminate Time-Wasters Key Talking Points: Time is often wasted on habits or tasks done out of habit rather than necessity. Telecommuting, batching emails and calls, and prioritizing can free significant hours. Share a Chaz story illustrating the benefit of cutting time-wasters. Activity: Losing the Time-Wasters – List at least seven habits, people or actions that wasted time last month; note which to keep and which to limit or eliminate. Journal Prompt: Outline how you'll adjust your schedule to deal with remaining time-wasters and estimate time saved by eliminating others. Time: ~60 minutes.

Lesson 3.4 – Commit to Business and Personal Time Key Talking Points: To build a business and a fulfilling life, schedule both business tasks and personal activities—and honour them. Use Mark Twain's quote, "Do the thing you fear the most, and the death of fear is certain," to emphasize commitment. Activity: Time Commitments – List weekly business tasks (accounting, inventory, marketing, client calls) with time estimates, and personal commitments (family lunches, workouts, hobbies) with time estimates. Journal Prompt: Compare these commitments to your first draft schedule and the time saved from eliminating time-wasters; anticipate stress level changes. Time: ~60 minutes.

Lesson 3.5 – Rewrite a New Schedule Key Talking Points: The new schedule is a template that informs daily calendars. Colour coding can help visual learners see time allocation. Resist changing the schedule after the first conflict; evaluate before adjusting. Activity: My Rewritten Schedule – Fill the weekly grid with the balanced commitments, align with your foundation and big picture elements, and eliminate time-wasters. Make multiple copies. Journal Prompt: Compare the new schedule to the original; assess whether it better reflects priorities and reduces stress. Time: ~60 minutes.

Assignment/Action Step: Live with the new schedule for at least one week, track adherence and adjust if necessary.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Three).

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 4: Marketing — Five "P"s in a Pod, we will continue building on these ideas.

Module 4: Marketing — Five "P"s in a Pod

Hook: Welcome to Module 4: Marketing — Five "P"s in a Pod. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Demystifying Marketing: Product, Pricing, Propagation, Positioning & Promotion

Module Overview: Chaz simplifies marketing into five essential "P"s. Retirees will evaluate their product from the customer's viewpoint, set a price reflecting value, design appropriate delivery channels, position their offering against competitors, and craft promotional strategies. Essentials Exercise Four condenses these into a single exercise.

Lessons & Activities:

Lesson 4.1 – Consider Your Product from Your Customers' Perspective Key Talking Points: Entrepreneurs often view their product like adoring parents view a baby; customers compare your product to many others. Use the RAW method: Relevance (meets needs/desires), Accessibility (easy to obtain), and Worth (perceived value relative to price). Activity: The RAW Truth about My Product – List strengths and weaknesses for each RAW category from the customer perspective. Journal Prompt: Perform the same RAW analysis from your perspective and compare. Time: ~45 minutes.

Lesson 4.2 – Work Out the Pricing of Your Product Key Talking Points: Pricing balances customer value and sustainable revenue. The "bungee cord" analogy illustrates the effort to connect price and value. Steps: identify value and expected price range, determine highest and lowest viable prices (considering competition and costs), then set a final price. Activity: Making Price Meet Value – Describe value and expected price range; calculate price extremes with overhead included; set and justify final price. Journal Prompt: Reflect on whether final price differs from expectations and how adding value could allow a higher price. Time: ~60 minutes.

Lesson 4.3 – Design Your Delivery Channels (Propagation) Key Talking Points: Propagation refers to distribution—how your product reaches customers. Options include storefronts, home delivery, mail order, online downloads, and hybrid models. Discuss the cost and logistics of each. Activity: Product Propagation – Describe your place of business and outline each step required to deliver the product to the customer; estimate the cost of each step and calculate total cost. Journal Prompt: Evaluate whether delivery is too costly or time-consuming and identify possible streamlining. Time: ~60 minutes.

Lesson 4.4 – Determine Your Position in Customers' Minds Key Talking Points: Customers purchase based on perception—ideas and memories. Positioning begins in the mind; all customer touchpoints (product quality, marketing messages, service, packaging, physical plant) influence positioning. Activity: Position Analysis – Compare your product to two competitors across five elements: product reputation, message (advertising & selling points), customer service, packaging/presentation, and physical plant appearance. Rank each business for each element and determine your overall positioning rank. Journal Prompt: Note surprises in the ranking; identify areas for improvement or maintenance. Time: ~45 minutes.

Lesson 4.5 – Plan Your Promotional Strategy Key Talking Points: Promotion communicates product benefits, price, delivery and positioning. It uses media such as in-store displays, websites, emails, social media, local newspapers, radio, TV and events. The message must highlight benefits more than features. Activity: Promoting My Product – Write a core promotional message covering product benefits, price, propagation and positioning. Decide where to deliver this message, how often, and with what budget. Write three sample advertisements (radio, TV or print) using your message points. Journal Prompt: Identify the strongest parts of your promotional message and why they resonate. Time: ~60 minutes.

Assignment/Action Step: Integrate insights into a succinct marketing plan summarising product evaluation, pricing strategy, delivery channels, competitive positioning and promotional tactics.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Four).

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 5: Money, Money, we will continue building on these ideas.

Module 5: Money, Money

Hook: Welcome to Module 5: Money, Money. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Money Matters: Budgeting, Trends, Cash Flow & Profit

Module Overview: Inspired by Andy Warhol's statement that "making money is art," this module covers the financial foundation of a business. Participants will document revenues and expenses, project trends based on past patterns and market factors, predict near-term outcomes, evaluate cash flow, and assemble a three-month working budget to plan for profitability. Essentials Exercise Five mirrors these steps.

Lessons & Activities:

Lesson 5.1 – Establish Your Revenues and Expenses Key Talking Points: A business cannot rely solely on integrity and popularity; it needs a clear picture of money. A budget provides this picture by listing revenues and categorizing expenses into fixed (stable costs such as payroll, benefits, rent, utilities, supplies, advertising) and variable (costs that vary with business activity: overtime, materials, volume purchasing). Activity: Revenues and Expenses Worksheet – For the last three months, list revenue streams and expenses; calculate monthly averages; classify expenses as fixed or variable. Journal Prompt: Compare actual figures with expectations and note desired changes. Time: ~60 minutes.

Lesson 5.2 – Project Trends for Your Business Key Talking Points: Just as athletes anticipate where the ball will be, entrepreneurs predict patterns using past experience. Identify busy seasons, slow seasons, current and desired customer age ranges, and market factors like local economic conditions. Use examples such as espresso machine replacement cycles in a café. Activity: Spotting Trends – List busy and slow months, ages of current and target customers, growth areas in revenues and expenses, customers' ability to spend, planned asset purchases, and local/national economic conditions. Journal Prompt: Choose five trends likely to affect next year's budget; explain which trend is most concerning and which is most encouraging. Time: ~60 minutes.

Lesson 5.3 – Predict Outcomes for Your Business Key Talking Points: Predictions are not crystal-ball exercises; they involve reasonable forecasts based on likely events (e.g., a large employer moving into or out of the area, new housing developments, changes in regulations). Consider changes in customer base, local economy, staff, location or product. Activity: Predictions – Document probable changes in customer base (e.g., new high-tech business in town), local economic shifts (new employer, business closures), internal changes (staffing, facilities), product changes (new or revised offerings) and other factors. Journal Prompt: Identify which changes will have the greatest positive or negative impact on your budget. Time: ~60 minutes.

Lesson 5.4 – Put Together a Cash Flow Plan Key Talking Points: Profit on paper does not guarantee cash in the bank. Cash flow refers only to actual cash in and out—cash on hand and depositable funds—not credit lines or asset values. Malcolm Forbes's story demonstrates that without cash, profit figures are meaningless. Activity: Cash Flow Assessment – Using bank statements and receipts, list monthly cash inflows (sales, accounts receivable) and cash outflows (expenses). Calculate totals and monthly averages. Journal Prompt: Note whether cash flow figures were surprising and why. Time: ~60 minutes.

Lesson 5.5 – Determine a Strategy for Profit Key Talking Points: Profitability requires managing revenues, expenses and cash flow based on projections and predictions. Without profit, you cannot retain employees or motivate yourself. Activity: My Working Budget – Develop a budget for the next three months using the revenue, expense, trend, prediction and cash flow data. Calculate net profits or losses and averages. Journal Prompt: Identify adjustments needed to improve net profits or cash flow. Consider how the subsequent quarter might look. Time: ~60–90 minutes.

Assignment/Action Step: Use your working budget to adjust pricing, expenses and marketing efforts; revisit monthly to track progress.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Five).

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 6: Finding Customers, we will continue building on these ideas.

Module 6: Finding Customers

Hook: Welcome to Module 6: Finding Customers. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: You Need Leads to Succeed: Lead Generation & Market Profiling

Module Overview: Sales cannot precede leads. This module teaches retirees how to generate leads by understanding who their potential customers are, where they are, how to contact them and how to make them aware of the business. Learners explore lead generation channels, profile their ideal customers, tailor their message, match media to their audience and develop a one-year lead-generation strategy. Essentials Exercise Six condenses these tasks.

Lessons & Activities:

Lesson 6.1 – Review Ways to Generate Leads Key Talking Points: Lead generation is a discipline. Channels include word of mouth/referrals, newspapers, magazines, press releases, telemarketing, direct mail, trade shows, internet (websites, social media), radio, television, outdoor advertising and telephone directories. Word of mouth is often the most powerful; ignore it at your peril. Each channel requires budget consideration. Activity: Options for Generating Leads – For each channel, answer two questions: (1) Would I like to generate leads with this option? (2) Can I afford it this year? Indicate “yes,” “no” or “maybe.” Journal Prompt: Identify the top three channels likely to produce results in the next year and explain why. Time: ~60 minutes.

Lesson 6.2 – Profile Your Target Market and Audience Key Talking Points: Building a customer profile is like forensic profiling—gather evidence (behaviour patterns, attitudes, influences, demographics) to describe the customer. Consider media preferences, influential people (celebrities, peers), hobbies, age range, gender mix, income, location and occupation. Activity: Building My Customer Profile – Answer the profiling questions and summarise them into a “Typical Customer Profile.” Journal Prompt: Compare the profile to your last five customers; adjust if there are discrepancies. Time: ~60 minutes.

Lesson 6.3 – Develop the Message for Your Profiled Customer Key Talking Points: Your promotional message must be tailored to your customer’s age, gender, interests, and location. Language matters: formal vs. informal, humour vs. seriousness, local references vs. generic. Activity: The Message to My Profiled Customer – Adapt the promotional message created in Module 4 to fit the customer profile. Adjust tone, language and emphasis while retaining core benefits, price, delivery and positioning. Journal Prompt: Explain how your profile changed the message. Time: ~45 minutes.

Lesson 6.4 – Match Media to Your Customers Key Talking Points: Choosing media requires understanding where your customers spend their time (e.g., local papers, Facebook, radio programs, community events). Compare potential media channels to your preferred channels from Lesson 6.1 and the profiled customer. Activity: Matching Media to My Customers – Create a table listing each media option and whether it matches the customer profile and whether it was selected on Day One. Identify overlaps as the best choices. Journal Prompt: Identify clear “winning” media; if none, decide how to reach customers anyway (e.g., personal networking, partnerships). Time: ~45 minutes.

Lesson 6.5 – Develop a One-Year Strategy for Lead Generation Key Talking Points: Decide which media to use, when, and how much to invest. Research costs by contacting providers; balance budget constraints with desired reach. Emphasize that lead generation need not be expensive; word-of-mouth and targeted classifieds can be powerful starting points. Activity: Media and Months – List your top three media choices and mark the months of the year each will be used. Note estimated costs (to be confirmed separately). Adjust the mix or budget to realistic levels. Journal Prompt: Consider other media to add in the future and when they might be appropriate. Time: ~60 minutes.

Assignment/Action Step: Select one lead-generation action you can implement immediately (e.g., ask three satisfied clients for referrals or post a targeted Facebook ad).

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Six).

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 7: Keeping Customers, we will continue building on these ideas.

Module 7: Keeping Customers

Hook: Welcome to Module 7: Keeping Customers. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Relationships & Retention: Turning Leads into Loyal Customers

Module Overview: Customer relationships make or break a business. This module teaches retirees how to turn leads into customers through persuasive pitches, provide excellent customer service, enhance customer lifetime value, convert loyal customers into evangelists, and remain on customers’ radar in a positive way. Essentials Exercise Seven condenses these lessons.

Lessons & Activities:

Lesson 7.1 – Discover How to Turn Leads into Customers Key Talking Points: Persuasion involves engaging leads in their comfort zones (locations, media, language), speaking to both head (logic, benefits) and heart (emotion, satisfaction), addressing specific needs, demonstrating benefits (not just features), removing objections (price, delivery) and making a clear offer. Activity: Pitch Development – Answer questions: What are my leads' comfort zones? What objective and emotional points will I convey? What needs must be addressed? How will I demonstrate benefits? What objections must I overcome? What specific offer will I make? Journal Prompt: Draft a persuasive pitch using the answers to the questions. Time: ~60 minutes.

Lesson 7.2 – Create a Customer Service Solutions Strategy Key Talking Points: Excellent customer service retains customers and reduces acquisition costs. People are often the frontline; FAQs, toll-free numbers, newsletters and chat rooms also help. Share a story of Chaz's friend Jeff, who treated three unkempt farmers respectfully and earned a large sale, then retained them as loyal customers. Activity: Customer Service Solutions – Outline your customer service strategy: people (employee training, respect), phone (hotlines), web (FAQs, chat), communications (newsletters, emails), and other (in-person events). Journal Prompt: Put yourself in the customer's shoes and describe what you would value in customer service; compare this to your current offerings and note gaps. Time: ~60 minutes.

Lesson 7.3 – Connect the Dots to Enhance Lifetime Customer Value Key Talking Points: Repeat business is the easiest way to grow profits. The connect-the-dots concept involves three threads: (1) defining the product's value to customers, (2) providing multiple ways for customers to connect (phone, email, social media, personal visits), and (3) recognizing customers as valued members of the business "family." Activity: Lifetime Value Connect-the-Dots – Describe how you will keep communicating the value of your product, the ways customers can connect with you, and how you will demonstrate that they are valued (newsletters, appreciation events, loyalty programs). Journal Prompt: Write a letter to your customers covering these three points; consider actually sending it to your top twenty-five customers. Time: ~45 minutes.

Lesson 7.4 – Turn Your Best Customers into Evangelists Key Talking Points: A small subset of dedicated customers will become evangelists if given permission and tools. Provide them with detailed product information, a privileged relationship (direct access, special events) and recognition (thank-you calls, lunches, advance product trials). Payment is not necessary; recognition is often enough. Activity: Making Evangelists for My Business – List five best customers. For each, decide what detailed product information, evidence of a privileged relationship, and recognition you will provide. Journal Prompt: List other customers who might become evangelists; decide whom to ask for referrals this week. Time: ~60 minutes.

Lesson 7.5 – Stay on Your Customers' Radar Screens in a Positive Way Key Talking Points: Abandoning customers after the first sale is like a groom walking out on his bride after the wedding. Maintain contact through regular updates, value-added communications, special offers and events. Activity: Keeping on My Customers' Radar Screens – Answer: How will I change leads into customers? What customer service will I offer? How will I evaluate and appreciate lifetime customer value? How will I encourage customers to become references? What ongoing strategy will I use to "stay in front" of my customers (newsletters, calls, events)? Journal Prompt: Tell the story of your relationship with one of your best customers—how you met, how you nurtured the relationship, and why they keep coming back. Time: ~60 minutes.

Assignment/Action Step: Implement one specific customer-retention or evangelist-conversion action this week (e.g., call a loyal customer to thank them and ask for referrals).

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Seven).

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 8: Putting It All Together, we will continue building on these ideas.

Module 8: Putting It All Together

Hook: Welcome to Module 8: Putting It All Together. In this module we will explore the topics listed in your workbook. Listen carefully and follow along with the exercises.

Script Content:

Module Title: Planning & Exit Strategy: Managing People, Resources and the Future

Module Overview: This final module synthesizes all prior work and looks forward. Learners determine what they must manage for success (people, things, money), evaluate where they need help, identify long-term strengths, draft an exit strategy and write a brief yet comprehensive action plan. Essentials Exercise Eight mirrors these tasks.

Lessons & Activities:

Lesson 8.1 – Determine What You Need to Manage to Be a Success Key Talking Points: Management falls into three categories: people, things and money. The success of your business depends on managing all three. People include partners, employees and family members who may work with you. Things encompass promotion, raw materials, equipment, office space, etc. Money involves budgeting, financial tracking and banking relationships. Activity: Managing for Success – Answer: Who are the people I need to manage, and how will I keep them on task? What “things” must I manage and how? How will I manage money effectively (budget reviews, meetings with a banker)? Journal Prompt: Identify challenges, strengths and weaknesses in managing people, things and money. Set a date to revisit these questions. Time: ~60 minutes.

Lesson 8.2 – Determine Where You Need Help Key Talking Points: Like circus performers spinning plates, entrepreneurs have a limit to what they can juggle. Identify tasks you dislike or are not good at, tasks you should avoid, areas where you need to duplicate yourself, and tasks that consume too much time. Decide whether to outsource or hire for these areas. Activity: Do I Need Someone Else’s Help? – List three tasks you enjoy least; identify any function you should avoid; identify functions requiring duplication; determine whether you need day-to-day help (phones, correspondence); note tasks taking too much time. Decide which can be outsourced or assigned. Journal Prompt: Prioritize your help needs and note benefits of getting help. Time: ~60 minutes.

Lesson 8.3 – Identify Your Personal Long-Term Business Strengths Key Talking Points: Use the cross-country running analogy: exploit real talents (play to strengths), cultivate perseverance (finish the race), and pace yourself (avoid burnout). Self-awareness and realistic pacing sustain long-term success. Activity: My Long-Term Business Strengths – Identify personal talents that can be leveraged; describe how to stay “in the race” emotionally, physically and relationally; plan how to pace yourself financially. Journal Prompt: Discuss your strengths with a spouse or friend and note insights. Time: ~45 minutes.

Lesson 8.4 – Draft Your Exit Strategy Key Talking Points: Michael Gerber advises thinking about exit strategy from day one. Consider three factors: Where (location value), Who (staff skill and self-motivation), and What (viability of product/service). A business is more valuable to buyers when these factors are attractive. Activity: Today’s Exit Strategy –

Write the Where, Who and What factors for your business (location importance, staff readiness for new ownership, product viability now and in five to ten years). Journal Prompt: Estimate current market value of your business and decide whether that amount is acceptable; determine what you will do to increase perceived value. Time: ~60 minutes.

Lesson 8.5 – Write a Brief Yet Comprehensive, Objective-Based Action Plan Key Talking Points: The will to succeed is worthless without preparation. Action plans should be concise yet comprehensive, include specific behavioural objectives, and align with personal, profit and promotional goals. After eight weeks of work, objectives should reflect growth. Activity: Today's Business Objectives – Write at least three behavioural objectives covering personal life (family, health, hobbies, faith), profits (cash flow, budget adjustments) and promotional efforts. Include what, how and by when. Add additional objectives as needed. Journal Prompt: Evaluate whether objectives seem attainable; revise if necessary and schedule a date to revisit them. Wrap-Up: Summarise three priority items to address immediately, who to contact and when, three major changes to implement, additional topics to explore, and the most important discovery made about yourself or your business. Time: ~60–90 minutes.

Assignment/Action Step: Implement your action plan by following through on priority items, contacting necessary people, and scheduling implementation dates. Plan quarterly reviews to adjust objectives and exit strategy.

Estimated Module Completion Time: 6–7 hours (Mastery) or ~1 hour (Essentials Exercise Eight).

Supplementary Recommendations Suggested Visuals & Demonstrations

Module 1: Use a mind-map graphic to illustrate influences on decision-making, and a four-quadrant chart for attitudes, beliefs, motivations and people. Incorporate a short video demonstration showing how to list influences and narrow them down.

Module 2: Provide a blank "life big picture" diagram template with circles for people, activities and roles. Include a colour palette and sound icons for learners to choose from when adding flavours, colours and sounds. A demonstration of drawing the business big picture would help visual learners.

Module 3: Offer printable weekly calendar templates and a video on how to balance commitments. Consider a slide illustrating the concept of removing time-wasters with before-and-after schedules.

Module 4: Create an infographic summarising the 5 P's of Marketing (Product, Pricing, Propagation, Positioning, Promotion) and a separate chart explaining the RAW (Relevance, Accessibility, Worth) product evaluation method. Provide example price setting scenarios.

Module 5: Use spreadsheet screenshots to teach revenue/expense listing and cash flow assessment. Provide a visual chart of busy vs. slow months and a template for the three-month budget.

Module 6: Include a customer avatar worksheet with fields for age, gender, hobbies, media habits, etc., and a media comparison table. Add a demonstration of writing a tailored message and placing a targeted social media ad.

Module 7: Show a funnel diagram mapping the journey from lead to loyal customer to evangelist. Provide a customer-service checklist and sample thank-you letter. Include a short video of a conversation with a loyal customer to highlight relationship building.

Module 8: Present a Venn diagram illustrating the intersection of people, things and money. Offer a template for outsourcing/hiring decisions and an exit strategy checklist. Provide examples of concise business plans and objective statements.

Ideas for Printable Worksheets & Checklists

Decision Influences Worksheet: A sheet with twenty-one numbered lines for listing influences and sections for narrowing them down.

Your Foundation Workbook: Separate pages for listing attitudes, beliefs, motivations and people; positives/negatives; refinement lists.

Big Picture Templates: Blank diagrams for life and business pictures with space for people, activities, roles, flavours, colours, sounds.

Objective Planner: A form with columns for specific target, behaviour, responsible person(s), and due date.

Weekly Schedule Template: A 7×24 grid with space for writing time blocks and an adjacent column for comments.

Revenue/Expense & Cash Flow Sheets: Tables for recording monthly income and expenses, categorizing fixed vs. variable costs, and cash in/out.

Customer Profile Worksheet: Questions covering demographics, media habits, influences, interests and occupation with a summary section.

Pitch Builder: A checklist of key components (comfort zones, head/heart issues, needs, benefits, objections, offer) with space for drafting a persuasive pitch.

Customer Service Planner: Sections for people, phone, web, communications, and other channels with checklists.

Exit Strategy Checklist: Prompts for Where/Who/What factors and estimated business value.

Action Plan Outline: A worksheet for personal, profit and promotional objectives with spaces for what, how, and by when; plus a wrap-up section for priority items, contacts and changes.

Lead Magnet Tie-Ins

Free Self-Assessment Quiz: An online quiz based on Module 1 that helps prospective students evaluate whether they are wired for entrepreneurship. Collect email addresses to add to a mailing list.

Business Ideas Guide: A downloadable PDF listing ten retiree-friendly business ideas (consulting, tutoring, pet care, gardening, event planning, craft sales, digital products, caregiving coordination, personal chef, travel planning), each aligned with low-risk, low-overhead models.

Weekly Newsletter with Tips: A free newsletter delivering short tips extracted from each module (e.g., time-management hacks, pricing strategies) and promoting the paid course.

Short Video Series: A three-part video introduction covering your foundation, big picture creation and basic marketing, offered free upon sign-up.

Printable Checklist: A one-page business launch checklist summarising the essentials (default setting readiness, big picture clarity, schedule prepared, marketing plan drafted, budget created, lead generation strategy in place).

Missing Pieces & Future Development

Modern Examples and Case Studies: Incorporate stories of retirees who have successfully launched micro-businesses in recent years (post-pandemic shifts, digital pivot) to inspire learners. Interviews or testimonials could be added as supplementary content.

Technology Basics for Retirees: Although this course avoids advanced digital marketing, a separate module or appendix covering email setup, social media basics, and simple website builders could help tech-averse students.

Community & Accountability: Establish a private online forum or scheduled group calls where learners can share progress, ask questions and support one another. This addresses the desire for human interaction noted in research on older learners.

Accessibility Features: Ensure all videos include captions and transcripts; provide large-print versions of worksheets; consider an audio-only option for visually impaired learners.

Ongoing Support Offers: After completing the course, offer optional monthly or quarterly coaching sessions, mastermind groups or alumni workshops to maintain momentum and update business strategies as markets evolve.

Call-to-Action:

After watching this lesson, complete the corresponding exercises in your workbook. Use the journal prompts to reflect on your insights, and check off your progress in the worksheet.

Transition: In our next module, Module 8: Putting It All Together, we will continue building on these ideas.

Workbooks & Worksheets: Workbook & Worksheets

This workbook accompanies the course and contains all exercises and journaling prompts.

All worksheets are provided in two formats: as printable PDFs for pen-and-paper use, and as online fillable forms for digital convenience.

Module 0: Welcome & Course Setup Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Retirement Reinvented: Setting Up for Success

Module Overview: Introduce the course purpose, differences between the Mastery and Essentials tracks, and expectations. Emphasize that success comes through consistent action and honest reflection. Learners prepare a quiet workspace, gather recent bank statements and bills, obtain scratch paper and pens, and print out worksheets. Highlight that Mastery requires five sessions per week (with two catch-up days) over eight weeks, while Essentials compresses the journey into ten hours. The guiding slogan is “Give us an hour a day, and we’ll give you the launching pad for your business.”

Lessons & Activities:

Lesson 0.1 – Course Orientation: Explain objectives, materials, timeline and differences between Mastery (long course) and Essentials (short course). Learners commit to the course schedule and identify supportive family members.

Lesson 0.2 – Mindset Preparation: Discuss why retirees start businesses (purpose, boredom relief, supplemental income). Encourage learners to adopt a growth mindset and prepare for periods of uncertainty.

Assignment/Action Step: Set up a dedicated workspace, print all worksheets and schedule study blocks on a calendar.

Estimated Completion Time: 30 minutes.

Module 1: Discovering Your Foundation Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Knowing Yourself: Your Foundation & Decision-Making

Module Overview: Participants examine the internal “your foundation” that drive their behaviour—attitudes, beliefs, motivations and key people. Understanding these settings helps determine whether entrepreneurship suits them and reveals adjustments needed for success. The module integrates Essentials Exercise One in full.

Lessons & Activities:

Lesson 1.1 – Discover What Drives Your Decision-Making Key Talking Points: Explain “your foundation” as manufacturer settings for computers that remain until changed. Decisions reveal what truly matters; influences include family opinions, finances, preferences, environment, religious faith, peer pressure and future worries. Use analogies such as selecting a new car. Activity: What Drives My Decisions – List at least twenty-one influences on important decisions, cross out the five least influential, then highlight the seven most important and circle the top three. Journal Prompt: Reflect on the three top influences and what they reveal about personal wiring. Time: ~60 minutes.

Lesson 1.2 – Define Your Foundation Key Talking Points: Your foundation consist of attitudes (optimistic/pessimistic), beliefs (faith in God, trust in institutions), motivations (family, success, revenge, health), and people (family, spouse, mentors). Stress that these settings emerge under pressure. Activity: My Foundation – List five attitudes, five beliefs, five motivations and at least five people that shape everyday life. Journal Prompt: Identify which settings are visible or hidden to others and whether to reveal or conceal them. Time: ~45 minutes.

Lesson 1.3 – Determine the Positives and Negatives of Your Foundation Key Talking Points: Every default setting has benefits and drawbacks (e.g., pessimism breeds caution; optimism can blind one to risks; a 9-to-5 work ethic instils consistency; altruistic motivations may be tested by selfish behaviour of others). Activity: Positives & Negatives – For each category (attitudes, beliefs, motivations, people), list at least three positives and three negatives. Journal Prompt: Note which positives and negatives help or hinder you the most. Time: ~60 minutes.

Lesson 1.4 – Refine Your Foundation Key Talking Points: Your foundation can change over time. Attitudes and motivations shift as life priorities evolve (e.g., teenage car dreams vs. retiree family focus). Emphasize changing internal settings before altering relationships. Share personal anecdotes (insert a Chaz story here) to illustrate. Activity: Refining My Foundation – Based on positives and negatives, select five desired attitudes, five beliefs, five motivations and five people for your updated foundation; mark any changes from your original list. Journal Prompt: Explain why you made these changes and analyse their positive and negative implications. Time: ~60 minutes.

Lesson 1.5 – Determine Whether Running Your Own Business Resonates with Your Foundation Key Talking Points: Entrepreneurship is not for everyone. An honest self-assessment can prevent wasted money and heartache. Chaz recounts walking away from ventures when timing wasn't right. Some retirees may find greater fulfilment in non-business roles (parent, volunteer). Activity: Will My Foundation Support My Business? – Evaluate whether your attitudes, beliefs, motivations and primary people support a personal business. Answer questions about helpfulness/harmfulness of attitudes, alignment of beliefs with success, resilience of motivations, and encouragement from key people. Journal Prompt: If the answer is "no," decide whether to change expectations or strengthen settings. If "yes," describe the support you expect from each category. Time: ~60–90 minutes.

Assignment/Action Step: Decide whether to pursue entrepreneurship now. If yes, commit to the remaining modules; if no, set personal development goals and revisit later.

Estimated Module Completion Time: 5–7 hours (Mastery) or ~1 hour (Essentials Exercise One).

Module 2: Big Pictures Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Creating Vision: Big Pictures for Life and Business

Module Overview: Learners construct “big pictures” for their life and business, identifying external elements (people, activities, roles, flavours, colours and sounds) and ensuring business occupies an appropriate place within life’s larger canvas. Participants set specific objectives and due dates to guide their business picture. The module includes Essentials Exercise Two.

Lessons & Activities:

Lesson 2.1 – Identify Elements of Your Life’s Big Picture Key Talking Points: Distinguish internal your foundation (mostly invisible) from external big picture elements (visible). Big picture elements include supportive and negative people, daily activities, hobbies, and roles. Activity: What Makes Up My Big Picture – List at least twelve people (individuals and groups), twelve activities and seven roles that compose your life. Journal Prompt: Consider which elements deserve greater or lesser attention; sketch a rough diagram. Note whether “business owner” appears among roles and why. Time: ~60 minutes.

Lesson 2.2 – Add Flavours, Colours and Sounds to Your Big Picture Key Talking Points: Use sensory metaphors to deepen understanding: flavours (spicy, bland, sweet, bitter) reflect emotional tone; colours (bright, royal, natural, technological) indicate energy and focus; sounds (music, noise, quiet, voices) evoke environment. Encourage retirees to think creatively. Activity: Flavours, Colours and Sounds for My Big Picture – List three current flavours and their “taste,” three desired flavours and their effect, two current colours and a descriptive word, two desired colours and a word, three current sounds and their effect, and three desired sounds and their desired effect. Journal Prompt: Craft a one-sentence description of your life’s big picture and outline how you will keep or change flavours, colours and sounds. Time: ~45 minutes.

Lesson 2.3 – Put Together the Big Picture for Your Business Key Talking Points: Business is a picture within the larger life picture; if it becomes the entire canvas, health and relationships suffer. Discuss business-specific people (partners, employees), activities (operations, sales, marketing), roles (accountant, salesperson, researcher, boss), and flavours/colours/sounds. Share a Chaz anecdote about balancing business and life. Activity: The Big Picture for My Business – For each category (people, activities, roles, flavours, colours, sounds) list items in two columns: As It Is and As I Want It To Be. Journal Prompt: Write a brief description of your current and desired business pictures. Identify positives and negatives and what improvements could bring positive results. Time: ~60 minutes.

Lesson 2.4 – Write Five Specific Objectives for Your Business Key Talking Points: Effective objectives include a specific target, specific behaviour, and specific responsible person(s). Corporate boardrooms often draft vague objectives; avoid that trap by being explicit. Use the sample: “Objective: My business will make an extra $15,000 through five additional sales calls each week by my senior sales person and myself.” Activity: Five Business Objectives – Based on your desired business picture, write five objectives following the target–behaviour–people format. Journal Prompt: Explain how each objective will influence people, activities, roles, flavours, colours and sounds in your business picture. Time: ~60 minutes.

Lesson 2.5 – Assign Due Dates to Your Objectives Key Talking Points: Deadlines convert objectives into commitments. They should be realistic and staggered according to priority and ease of implementation. Without due dates, objectives lose momentum. Activity: Objectives with Due Dates – Assign a due date to each objective (e.g., one by the end of the quarter, another in six months). Journal Prompt: Anticipate when you expect to see changes in your business picture and describe those changes. Time: ~60 minutes.

Assignment/Action Step: Share your life and business pictures and objectives with a trusted friend or mentor for accountability.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Two).

Module 3: Time Management Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Mastering Your Schedule: Make Time Work for You

Module Overview: Time management ensures retirees can balance business development with family, health and recreation. This module teaches learners to audit their current schedule, prioritise activities aligned with your foundation and big picture goals, eliminate time-wasting habits, commit to business and personal time blocks, and rewrite a realistic weekly schedule. The module integrates Essentials Exercise Three.

Lessons & Activities:

Lesson 3.1 – Write Out Your Present Schedule Key Talking Points: A clear baseline of how time is currently spent is vital before making changes. Activity: My Weekly Schedule, First Draft – Use a blank weekly grid (Sunday–Saturday, 24-hour slots) to note work, family, personal time, sleep, spiritual development, recreation, education, hobbies and meals. Journal Prompt: Compare hours spent working to hours spent resting or with family; identify categories requiring more balance. Time: ~60 minutes.

Lesson 3.2 – Identify Your Foundation and Big Picture Elements to Include Key Talking Points: Many retirees leave jobs because schedules ignored their your foundation. Now is the chance to align your schedule with your core values and priorities. Activity: Top Three Foundation and Big Picture Goals – Choose three your foundation (from Module 1) and three big picture elements (from Module 2) that must be honoured in your schedule. Journal Prompt: Evaluate whether focusing solely on these six items would simplify or complicate your schedule. Time: ~45 minutes.

Lesson 3.3 – Eliminate Time-Wasters Key Talking Points: Time is often wasted on habits or tasks done out of habit rather than necessity. Telecommuting, batching emails and calls, and prioritizing can free significant hours. Share a Chaz story illustrating the benefit of cutting time-wasters. Activity: Losing the Time-Wasters – List at least seven habits, people or actions that wasted time last month; note which to keep and which to limit or eliminate. Journal Prompt: Outline how you'll adjust your schedule to deal with remaining time-wasters and estimate time saved by eliminating others. Time: ~60 minutes.

Lesson 3.4 – Commit to Business and Personal Time Key Talking Points: To build a business and a fulfilling life, schedule both business tasks and personal activities—and honour them. Use Mark Twain's quote, "Do the thing you fear the most, and the death of fear is certain," to emphasize commitment. Activity: Time Commitments – List weekly business tasks (accounting, inventory, marketing, client calls) with time estimates, and personal commitments (family lunches, workouts, hobbies) with time estimates. Journal Prompt: Compare these commitments to your first draft schedule and the time saved from eliminating time-wasters; anticipate stress level changes. Time: ~60 minutes.

Lesson 3.5 – Rewrite a New Schedule Key Talking Points: The new schedule is a template that informs daily calendars. Colour coding can help visual learners see time allocation. Resist changing the schedule after the first conflict; evaluate before adjusting. Activity: My Rewritten Schedule – Fill the weekly grid with the balanced commitments, align with your foundation and big picture elements, and eliminate time-wasters. Make multiple copies. Journal Prompt: Compare the new schedule to the original; assess whether it better reflects priorities and reduces stress. Time: ~60 minutes.

Assignment/Action Step: Live with the new schedule for at least one week, track adherence and adjust if necessary.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Three).

Module 4: Marketing — Five “P”s in a Pod Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Demystifying Marketing: Product, Pricing, Propagation, Positioning & Promotion

Module Overview: Chaz simplifies marketing into five essential “P”s. Retirees will evaluate their product from the customer’s viewpoint, set a price reflecting value, design appropriate delivery channels, position their offering against competitors, and craft promotional strategies. Essentials Exercise Four condenses these into a single exercise.

Lessons & Activities:

Lesson 4.1 – Consider Your Product from Your Customers’ Perspective Key Talking Points: Entrepreneurs often view their product like adoring parents view a baby; customers compare your product to many others. Use the RAW method: Relevance (meets needs/desires), Accessibility (easy to obtain), and Worth (perceived value relative to price). Activity: The RAW Truth about My Product – List strengths and weaknesses for each RAW category from the customer perspective. Journal Prompt: Perform the same RAW analysis from your perspective and compare. Time: ~45 minutes.

Lesson 4.2 – Work Out the Pricing of Your Product Key Talking Points: Pricing balances customer value and sustainable revenue. The “bungee cord” analogy illustrates the effort to connect price and value. Steps: identify value and expected price range, determine highest and lowest viable prices (considering competition and costs), then set a final price. Activity: Making Price Meet Value – Describe value and expected price range; calculate price extremes with overhead included; set and justify final price. Journal Prompt: Reflect on whether final price differs from expectations and how adding value could allow a higher price. Time: ~60 minutes.

Lesson 4.3 – Design Your Delivery Channels (Propagation) Key Talking Points: Propagation refers to distribution—how your product reaches customers. Options include storefronts, home delivery, mail order, online downloads, and hybrid models. Discuss the cost and logistics of each. Activity: Product Propagation – Describe your place of business and outline each step required to deliver the product to the customer; estimate the cost of each step and calculate total cost. Journal Prompt: Evaluate whether delivery is too costly or time-consuming and identify possible streamlining. Time: ~60 minutes.

Lesson 4.4 – Determine Your Position in Customers' Minds Key Talking Points: Customers purchase based on perception—ideas and memories. Positioning begins in the mind; all customer touchpoints (product quality, marketing messages, service, packaging, physical plant) influence positioning. Activity: Position Analysis – Compare your product to two competitors across five elements: product reputation, message (advertising & selling points), customer service, packaging/presentation, and physical plant appearance. Rank each business for each element and determine your overall positioning rank. Journal Prompt: Note surprises in the ranking; identify areas for improvement or maintenance. Time: ~45 minutes.

Lesson 4.5 – Plan Your Promotional Strategy Key Talking Points: Promotion communicates product benefits, price, delivery and positioning. It uses media such as in-store displays, websites, emails, social media, local newspapers, radio, TV and events. The message must highlight benefits more than features. Activity: Promoting My Product – Write a core promotional message covering product benefits, price, propagation and positioning. Decide where to deliver this message, how often, and with what budget. Write three sample advertisements (radio, TV or print) using your message points. Journal Prompt: Identify the strongest parts of your promotional message and why they resonate. Time: ~60 minutes.

Assignment/Action Step: Integrate insights into a succinct marketing plan summarising product evaluation, pricing strategy, delivery channels, competitive positioning and promotional tactics.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Four).

Module 5: Money, Money Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Money Matters: Budgeting, Trends, Cash Flow & Profit

Module Overview: Inspired by Andy Warhol's statement that "making money is art," this module covers the financial foundation of a business. Participants will document revenues and expenses, project trends based on past patterns and market factors, predict near-term outcomes, evaluate cash flow, and assemble a three-month working budget to plan for profitability. Essentials Exercise Five mirrors these steps.

Lessons & Activities:

Lesson 5.1 – Establish Your Revenues and Expenses Key Talking Points: A business cannot rely solely on integrity and popularity; it needs a clear picture of money. A budget provides this picture by listing revenues and categorizing expenses into fixed (stable costs such as payroll, benefits, rent, utilities, supplies, advertising) and variable (costs that vary with business activity: overtime, materials, volume purchasing). Activity: Revenues and Expenses Worksheet – For the last three months, list revenue streams and expenses; calculate monthly averages; classify expenses as fixed or variable. Journal Prompt: Compare actual figures with expectations and note desired changes. Time: ~60 minutes.

Lesson 5.2 – Project Trends for Your Business Key Talking Points: Just as athletes anticipate where the ball will be, entrepreneurs predict patterns using past experience. Identify busy seasons, slow seasons, current and desired customer age ranges, and market factors like local economic conditions. Use examples such as espresso machine replacement cycles in a café. Activity: Spotting Trends – List busy and slow months, ages of current and target customers, growth areas in revenues and expenses, customers' ability to spend, planned asset purchases, and local/national economic conditions. Journal Prompt: Choose five trends likely to affect next year's budget; explain which trend is most concerning and which is most encouraging. Time: ~60 minutes.

Lesson 5.3 – Predict Outcomes for Your Business Key Talking Points: Predictions are not crystal-ball exercises; they involve reasonable forecasts based on likely events (e.g., a large employer moving into or out of the area, new housing developments, changes in regulations). Consider changes in customer base, local economy, staff, location or product. Activity: Predictions – Document probable changes in customer base (e.g., new high-tech business in town), local economic shifts (new employer, business closures), internal changes (staffing, facilities), product changes (new or revised offerings) and other factors. Journal Prompt: Identify which changes will have the greatest positive or negative impact on your budget. Time: ~60 minutes.

Lesson 5.4 – Put Together a Cash Flow Plan Key Talking Points: Profit on paper does not guarantee cash in the bank. Cash flow refers only to actual cash in and out—cash on hand and depositable funds—not credit lines or asset values. Malcolm Forbes's story demonstrates that without cash, profit figures are meaningless. Activity: Cash Flow Assessment – Using bank statements and receipts, list monthly cash inflows (sales, accounts receivable) and cash outflows (expenses). Calculate totals and monthly averages. Journal Prompt: Note whether cash flow figures were surprising and why. Time: ~60 minutes.

Lesson 5.5 – Determine a Strategy for Profit Key Talking Points: Profitability requires managing revenues, expenses and cash flow based on projections and predictions. Without profit, you cannot retain employees or motivate yourself. Activity: My Working Budget – Develop a budget for the next three months using the revenue, expense, trend, prediction and cash flow data. Calculate net profits or losses and averages. Journal Prompt: Identify adjustments needed to improve net profits or cash flow. Consider how the subsequent quarter might look. Time: ~60–90 minutes.

Assignment/Action Step: Use your working budget to adjust pricing, expenses and marketing efforts; revisit monthly to track progress.

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Five).

Module 6: Finding Customers Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: You Need Leads to Succeed: Lead Generation & Market Profiling

Module Overview: Sales cannot precede leads. This module teaches retirees how to generate leads by understanding who their potential customers are, where they are, how to contact them and how to make them aware of the business. Learners explore lead generation channels, profile their ideal customers, tailor their message, match media to their audience and develop a one-year lead-generation strategy. Essentials Exercise Six condenses these tasks.

Lessons & Activities:

Lesson 6.1 – Review Ways to Generate Leads Key Talking Points: Lead generation is a discipline. Channels include word of mouth/referrals, newspapers, magazines, press releases, telemarketing, direct mail, trade shows, internet (websites, social media), radio, television, outdoor advertising and telephone directories. Word of mouth is often the most powerful; ignore it at your peril. Each channel requires budget consideration. Activity: Options for Generating Leads – For each channel, answer two questions: (1) Would I like to generate leads with this option? (2) Can I afford it this year? Indicate "yes," "no" or "maybe." Journal Prompt: Identify the top three channels likely to produce results in the next year and explain why. Time: ~60 minutes.

Lesson 6.2 – Profile Your Target Market and Audience Key Talking Points: Building a customer profile is like forensic profiling—gather evidence (behaviour patterns, attitudes, influences, demographics) to describe the customer. Consider media preferences, influential people (celebrities, peers), hobbies, age range, gender mix, income, location and occupation. Activity: Building My Customer Profile – Answer the profiling questions and summarise them into a "Typical Customer Profile." Journal Prompt: Compare the profile to your last five customers; adjust if there are discrepancies. Time: ~60 minutes.

Lesson 6.3 – Develop the Message for Your Profiled Customer Key Talking Points: Your promotional message must be tailored to your customer's age, gender, interests, and location. Language matters: formal vs. informal, humour vs. seriousness, local references vs. generic. Activity: The Message to My Profiled Customer – Adapt the promotional message created in Module 4 to fit the customer profile. Adjust tone, language and emphasis while retaining core benefits, price, delivery and positioning. Journal Prompt: Explain how your profile changed the message. Time: ~45 minutes.

Lesson 6.4 – Match Media to Your Customers Key Talking Points: Choosing media requires understanding where your customers spend their time (e.g., local papers, Facebook, radio programs, community events). Compare potential media channels to your preferred channels from Lesson 6.1 and the profiled customer. Activity: Matching Media to My Customers – Create a table listing each media option and whether it matches the customer profile and whether it was selected on Day One. Identify overlaps as the best choices. Journal Prompt: Identify clear "winning" media; if none, decide how to reach customers anyway (e.g., personal networking, partnerships). Time: ~45 minutes.

Lesson 6.5 – Develop a One-Year Strategy for Lead Generation Key Talking Points: Decide which media to use, when, and how much to invest. Research costs by contacting providers; balance budget constraints with desired reach. Emphasize that lead generation need not be expensive; word-of-mouth and targeted classifieds can be powerful starting points. Activity: Media and Months – List your top three media choices and mark the months of the year each will be used. Note estimated costs (to be confirmed separately). Adjust the mix or budget to realistic levels. Journal Prompt: Consider other media to add in the future and when they might be appropriate. Time: ~60 minutes.

Assignment/Action Step: Select one lead-generation action you can implement immediately (e.g., ask three satisfied clients for referrals or post a targeted Facebook ad).

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Six).

Module 7: Keeping Customers Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Relationships & Retention: Turning Leads into Loyal Customers

Module Overview: Customer relationships make or break a business. This module teaches retirees how to turn leads into customers through persuasive pitches, provide excellent customer service, enhance customer lifetime value, convert loyal customers into evangelists, and remain on customers' radar in a positive way. Essentials Exercise Seven condenses these lessons.

Lessons & Activities:

Lesson 7.1 – Discover How to Turn Leads into Customers Key Talking Points: Persuasion involves engaging leads in their comfort zones (locations, media, language), speaking to both head (logic, benefits) and heart (emotion, satisfaction), addressing specific needs, demonstrating benefits (not just features), removing objections (price, delivery) and making a clear offer. Activity: Pitch Development – Answer questions: What are my leads' comfort zones? What objective and emotional points will I convey? What needs must be addressed? How will I demonstrate benefits? What objections must I overcome? What specific offer will I make? Journal Prompt: Draft a persuasive pitch using the answers to the questions. Time: ~60 minutes.

Lesson 7.2 – Create a Customer Service Solutions Strategy Key Talking Points: Excellent customer service retains customers and reduces acquisition costs. People are often the frontline; FAQs, toll-free numbers, newsletters and chat rooms also help. Share a story of Chaz's friend Jeff, who treated three unkempt farmers respectfully and earned a large sale, then retained them as loyal customers. Activity: Customer Service Solutions – Outline your customer service strategy: people (employee training, respect), phone (hotlines), web (FAQs, chat), communications (newsletters, emails), and other (in-person events). Journal Prompt: Put yourself in the customer's shoes and describe what you would value in customer service; compare this to your current offerings and note gaps. Time: ~60 minutes.

Lesson 7.3 – Connect the Dots to Enhance Lifetime Customer Value Key Talking Points: Repeat business is the easiest way to grow profits. The connect-the-dots concept involves three threads: (1) defining the product's value to customers, (2) providing multiple ways for customers to connect (phone, email, social media, personal visits), and (3) recognizing customers as valued members of the business "family." Activity: Lifetime Value Connect-the-Dots – Describe how you will keep communicating the value of your product, the ways customers can connect with you, and how you will demonstrate that they are valued (newsletters, appreciation events, loyalty programs). Journal Prompt: Write a letter to your customers covering these three points; consider actually sending it to your top twenty-five customers. Time: ~45 minutes.

Lesson 7.4 – Turn Your Best Customers into Evangelists Key Talking Points: A small subset of dedicated customers will become evangelists if given permission and tools. Provide them with detailed product information, a privileged relationship (direct access, special events) and recognition (thank-you calls, lunches, advance product trials). Payment is not necessary; recognition is often enough. Activity: Making Evangelists for My Business – List five best customers. For each, decide what detailed product information, evidence of a privileged relationship, and recognition you will provide. Journal Prompt: List other customers who might become evangelists; decide whom to ask for referrals this week. Time: ~60 minutes.

Lesson 7.5 – Stay on Your Customers' Radar Screens in a Positive Way Key Talking Points: Abandoning customers after the first sale is like a groom walking out on his bride after the wedding. Maintain contact through regular updates, value-added communications, special offers and events. Activity: Keeping on My Customers' Radar Screens – Answer: How will I change leads into customers? What customer service will I offer? How will I evaluate and appreciate lifetime customer value? How will I encourage customers to become references? What ongoing strategy will I use to "stay in front" of my customers (newsletters, calls, events)? Journal Prompt: Tell the story of your relationship with one of your best customers—how you met, how you nurtured the relationship, and why they keep coming back. Time: ~60 minutes.

Assignment/Action Step: Implement one specific customer-retention or evangelist-conversion action this week (e.g., call a loyal customer to thank them and ask for referrals).

Estimated Module Completion Time: 5–6 hours (Mastery) or ~1 hour (Essentials Exercise Seven).

Module 8: Putting It All Together Workbook Completion Checklist

Watch all video lessons for this module

Complete all exercises below

Reflect using the journal prompts

Review your progress and mark items complete

Exercises and Prompts

Module Title: Planning & Exit Strategy: Managing People, Resources and the Future

Module Overview: This final module synthesizes all prior work and looks forward. Learners determine what they must manage for success (people, things, money), evaluate where they need help, identify long-term strengths, draft an exit strategy and write a brief yet comprehensive action plan. Essentials Exercise Eight mirrors these tasks.

Lessons & Activities:

Lesson 8.1 – Determine What You Need to Manage to Be a Success Key Talking Points: Management falls into three categories: people, things and money. The success of your business depends on managing all three. People include partners, employees and family members who may work with you. Things encompass promotion, raw materials, equipment, office space, etc. Money involves budgeting, financial tracking and banking relationships. Activity: Managing for Success – Answer: Who are the people I need to manage, and how will I keep them on task? What "things" must I manage and how? How will I manage money effectively (budget reviews, meetings with a banker)? Journal Prompt: Identify challenges, strengths and weaknesses in managing people, things and money. Set a date to revisit these questions. Time: ~60 minutes.

Lesson 8.2 – Determine Where You Need Help Key Talking Points: Like circus performers spinning plates, entrepreneurs have a limit to what they can juggle. Identify tasks you dislike or are not good at, tasks you should avoid, areas where you need to duplicate yourself, and tasks that consume too much time. Decide whether to outsource or hire for these areas. Activity: Do I Need Someone Else's Help? – List three tasks you enjoy least; identify any function you should avoid; identify functions requiring duplication; determine whether you need day-to-day help (phones, correspondence); note tasks taking too much time. Decide which can be outsourced or assigned. Journal Prompt: Prioritize your help needs and note benefits of getting help. Time: ~60 minutes.

Lesson 8.3 – Identify Your Personal Long-Term Business Strengths Key Talking Points: Use the cross-country running analogy: exploit real talents (play to strengths), cultivate perseverance (finish the race), and pace yourself (avoid burnout). Self-awareness and realistic pacing sustain long-term success. Activity: My Long-Term Business Strengths – Identify personal talents that can be leveraged; describe how to stay "in the race" emotionally, physically and relationally; plan how to pace yourself financially. Journal Prompt: Discuss your strengths with a spouse or friend and note insights. Time: ~45 minutes.

Lesson 8.4 – Draft Your Exit Strategy Key Talking Points: Michael Gerber advises thinking about exit strategy from day one. Consider three factors: Where (location value), Who (staff skill and self-motivation), and What (viability of product/service). A business is more valuable to buyers when these factors are attractive. Activity: Today's Exit Strategy – Write the Where, Who and What factors for your business (location importance, staff readiness for new ownership, product viability now and in five to ten years). Journal Prompt: Estimate current market value of your business and decide whether that amount is acceptable; determine what you will do to increase perceived value. Time: ~60 minutes.

Lesson 8.5 – Write a Brief Yet Comprehensive, Objective-Based Action Plan Key Talking Points: The will to succeed is worthless without preparation. Action plans should be concise yet comprehensive, include specific behavioural objectives, and align with personal, profit and promotional goals. After eight weeks of work, objectives should reflect growth. Activity: Today's Business Objectives – Write at least three behavioural objectives covering personal life (family, health, hobbies, faith), profits (cash flow, budget adjustments) and promotional efforts. Include what, how and by when. Add additional objectives as needed. Journal Prompt: Evaluate whether objectives seem attainable; revise if necessary and schedule a date to revisit them. Wrap-Up: Summarise three priority items to address immediately, who to contact and when, three major changes to implement, additional topics to explore, and the most important discovery made about yourself or your business. Time: ~60–90 minutes.

Assignment/Action Step: Implement your action plan by following through on priority items, contacting necessary people, and scheduling implementation dates. Plan quarterly reviews to adjust objectives and exit strategy.

Estimated Module Completion Time: 6–7 hours (Mastery) or ~1 hour (Essentials Exercise Eight).

Supplementary Recommendations Suggested Visuals & Demonstrations

Module 1: Use a mind-map graphic to illustrate influences on decision-making, and a four-quadrant chart for attitudes, beliefs, motivations and people. Incorporate a short video demonstration showing how to list influences and narrow them down.

Module 2: Provide a blank “life big picture” diagram template with circles for people, activities and roles. Include a colour palette and sound icons for learners to choose from when adding flavours, colours and sounds. A demonstration of drawing the business big picture would help visual learners.

Module 3: Offer printable weekly calendar templates and a video on how to balance commitments. Consider a slide illustrating the concept of removing time-wasters with before-and-after schedules.

Module 4: Create an infographic summarising the 5 P’s of Marketing (Product, Pricing, Propagation, Positioning, Promotion) and a separate chart explaining the RAW (Relevance, Accessibility, Worth) product evaluation method. Provide example price setting scenarios.

Module 5: Use spreadsheet screenshots to teach revenue/expense listing and cash flow assessment. Provide a visual chart of busy vs. slow months and a template for the three-month budget.

Module 6: Include a customer avatar worksheet with fields for age, gender, hobbies, media habits, etc., and a media comparison table. Add a demonstration of writing a tailored message and placing a targeted social media ad.

Module 7: Show a funnel diagram mapping the journey from lead to loyal customer to evangelist. Provide a customer-service checklist and sample thank-you letter. Include a short video of a conversation with a loyal customer to highlight relationship building.

Module 8: Present a Venn diagram illustrating the intersection of people, things and money. Offer a template for outsourcing/hiring decisions and an exit strategy checklist. Provide examples of concise business plans and objective statements.

Ideas for Printable Worksheets & Checklists

Decision Influences Worksheet: A sheet with twenty-one numbered lines for listing influences and sections for narrowing them down.

Your Foundation Workbook: Separate pages for listing attitudes, beliefs, motivations and people; positives/negatives; refinement lists.

Big Picture Templates: Blank diagrams for life and business pictures with space for people, activities, roles, flavours, colours, sounds.

Objective Planner: A form with columns for specific target, behaviour, responsible person(s), and due date.

Weekly Schedule Template: A 7×24 grid with space for writing time blocks and an adjacent column for comments.

Revenue/Expense & Cash Flow Sheets: Tables for recording monthly income and expenses, categorizing fixed vs. variable costs, and cash in/out.

Customer Profile Worksheet: Questions covering demographics, media habits, influences, interests and occupation with a summary section.

Pitch Builder: A checklist of key components (comfort zones, head/heart issues, needs, benefits, objections, offer) with space for drafting a persuasive pitch.

Customer Service Planner: Sections for people, phone, web, communications, and other channels with checklists.

Exit Strategy Checklist: Prompts for Where/Who/What factors and estimated business value.

Action Plan Outline: A worksheet for personal, profit and promotional objectives with spaces for what, how, and by when; plus a wrap-up section for priority items, contacts and changes.

Lead Magnet Tie-Ins

Free Self-Assessment Quiz: An online quiz based on Module 1 that helps prospective students evaluate whether they are wired for entrepreneurship. Collect email addresses to add to a mailing list.

Business Ideas Guide: A downloadable PDF listing ten retiree-friendly business ideas (consulting, tutoring, pet care, gardening, event planning, craft sales, digital products, caregiving coordination, personal chef, travel planning), each aligned with low-risk, low-overhead models.

Weekly Newsletter with Tips: A free newsletter delivering short tips extracted from each module (e.g., time-management hacks, pricing strategies) and promoting the paid course.

Short Video Series: A three-part video introduction covering your foundation, big picture creation and basic marketing, offered free upon sign-up.

Printable Checklist: A one-page business launch checklist summarising the essentials (default setting readiness, big picture clarity, schedule prepared, marketing plan drafted, budget created, lead generation strategy in place).

Missing Pieces & Future Development

Modern Examples and Case Studies: Incorporate stories of retirees who have successfully launched micro-businesses in recent years (post-pandemic shifts, digital pivot) to inspire learners. Interviews or testimonials could be added as supplementary content.

Technology Basics for Retirees: Although this course avoids advanced digital marketing, a separate module or appendix covering email setup, social media basics, and simple website builders could help tech-averse students.

Community & Accountability: Establish a private online forum or scheduled group calls where learners can share progress, ask questions and support one another. This addresses the desire for human interaction noted in research on older learners.

Accessibility Features: Ensure all videos include captions and transcripts; provide large-print versions of worksheets; consider an audio-only option for visually impaired learners.

Ongoing Support Offers: After completing the course, offer optional monthly or quarterly coaching sessions, mastermind groups or alumni workshops to maintain momentum and update business strategies as markets evolve.

Slide Deck Outlines: Slide Deck Outlines Slides for Module 0: Welcome & Course Setup

Slide 1: * Module Title: Retirement Reinvented: Setting Up for Success ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 2: ---...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slides for Module 1: Discovering Your Foundation

Slide 1: * Module Title: Knowing Yourself: Your Foundation & Decision-Making ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 1.2 – Define Your Foundation ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 1.3 – Determine the Positives and Negatives of Your Foundation ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 4: - Lesson 1.4 – Refine Your Foundation ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

**Slide 5: - Lesson 1.5 – Determine Whether Running Your Own Business Resonates with Your...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Decide whether to pursue entrepreneurship now. I...

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[Insert illustrative image or diagram here to support the concept.]

Slide 7: ---...

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[Insert illustrative image or diagram here to support the concept.]

Slides for Module 2: Big Pictures

Slide 1: * Module Title: Creating Vision: Big Pictures for Life and Business ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 2.2 – Add Flavours, Colours and Sounds to Your Big Picture ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 2.3 – Put Together the Big Picture for Your Business ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 4: - Lesson 2.4 – Write Five Specific Objectives for Your Business ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 5: - Lesson 2.5 – Assign Due Dates to Your Objectives ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Share your life and business pictures and objecti...

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[Insert illustrative image or diagram here to support the concept.]

Slide 7: ---...

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[Insert illustrative image or diagram here to support the concept.]

Slides for Module 3: Time Management

Slide 1: * Module Title: Mastering Your Schedule: Make Time Work for You ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 3.2 – Identify Your Foundation and Big Picture Elements to Include ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 3.3 – Eliminate Time-Wasters ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 4: - Lesson 3.4 – Commit to Business and Personal Time ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 5: - Lesson 3.5 – Rewrite a New Schedule ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Live with the new schedule for at least one week,...

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Slide 7: ---...

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[Insert illustrative image or diagram here to support the concept.]

Slides for Module 4: Marketing — Five “P”s in a Pod

*Slide 1: * Module Title: Demystifying Marketing: Product, Pricing, Propagation, Pos...

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[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 4.2 – Work Out the Pricing of Your Product ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 4.3 – Design Your Delivery Channels (Propagation) ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 4: - Lesson 4.4 – Determine Your Position in Customers' Minds ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 5: - Lesson 4.5 – Plan Your Promotional Strategy ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Integrate insights into a succinct marketing plan...

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[Insert illustrative image or diagram here to support the concept.]

Slide 7: ---...

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[Insert illustrative image or diagram here to support the concept.]

Slides for Module 5: Money, Money

Slide 1: * Module Title: Money Matters: Budgeting, Trends, Cash Flow & Profit ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 5.2 – Project Trends for Your Business ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 5.3 – Predict Outcomes for Your Business ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 4: - Lesson 5.4 – Put Together a Cash Flow Plan ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 5: - Lesson 5.5 – Determine a Strategy for Profit ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Use your working budget to adjust pricing, expens...

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[Insert illustrative image or diagram here to support the concept.]

Slide 7: ---...

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[Insert illustrative image or diagram here to support the concept.]

Slides for Module 6: Finding Customers

*Slide 1: * Module Title: You Need Leads to Succeed: Lead Generation & Market Profil...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 6.2 – Profile Your Target Market and Audience ...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 6.3 – Develop the Message for Your Profiled Customer ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 4: - Lesson 6.4 – Match Media to Your Customers ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 5: - Lesson 6.5 – Develop a One-Year Strategy for Lead Generation ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Select one lead-generation action you can impleme...

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Slide 7: ---...

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[Insert illustrative image or diagram here to support the concept.]

Slides for Module 7: Keeping Customers

*Slide 1: * Module Title: Relationships & Retention: Turning Leads into Loyal Custom...

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[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 7.2 – Create a Customer Service Solutions Strategy ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 7.3 – Connect the Dots to Enhance Lifetime Customer Value ...

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Slide 4: - Lesson 7.4 – Turn Your Best Customers into Evangelists ...

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Slide 5: - Lesson 7.5 – Stay on Your Customers' Radar Screens in a Positive Way ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Implement one specific customer-retention or evan...

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Slide 7: ---...

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[Insert illustrative image or diagram here to support the concept.]

Slides for Module 8: Putting It All Together

*Slide 1: * Module Title: Planning & Exit Strategy: Managing People, Resources and t...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 2: - Lesson 8.2 – Determine Where You Need Help ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 3: - Lesson 8.3 – Identify Your Personal Long-Term Business Strengths ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 4: - Lesson 8.4 – Draft Your Exit Strategy ...

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Slide 5: - Lesson 8.5 – Write a Brief Yet Comprehensive, Objective-Based Action Plan ...

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[Insert illustrative image or diagram here to support the concept.]

Slide 6: * Assignment/Action Step: Implement your action plan by following through o...

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Slide 7: ---...

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Slide 8: ## Supplementary Recommendations...

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Slide 9: ### Suggested Visuals & Demonstrations...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 10: 1. Module 1: Use a mind-map graphic to illustrate influences on decision-ma...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 11: ### Ideas for Printable Worksheets & Checklists...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 12: - Decision Influences Worksheet: A sheet with twenty-one numbered lines for...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 13: ### Lead Magnet Tie-Ins...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 14: - Free Self-Assessment Quiz: An online quiz based on Module 1 that helps pr...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 15: ### Missing Pieces & Future Development...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Slide 16: - Modern Examples and Case Studies: Incorporate stories of retirees who hav...

Include full paragraph content on this slide.

[Insert illustrative image or diagram here to support the concept.]

Instructor Guide: Instructor Guide

This guide helps the on-camera instructor prepare for each module. It summarises the structure, timing and key points to emphasise, and lists any required props or examples.

All worksheets mentioned are available both as printable PDFs and as online fillable forms to accommodate different learning preferences.

Module 0: Welcome & Course Setup

Estimated Time: 0 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

“Give us an hour a day, and we’ll give you the launching pad for your business.”

Lessons & Activities:

Lesson 0.1 – Course Orientation:

Lesson 0.2 – Mindset Preparation:

Assignment/Action Step:

Estimated Completion Time:

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 1: Discovering Your Foundation

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise One

Lessons & Activities:

Lesson 1.1 – Discover What Drives Your Decision-Making

What Drives My Decisions

Lesson 1.2 – Define Your Foundation

My Foundation

Lesson 1.3 – Determine the Positives and Negatives of Your Foundation

Positives & Negatives

Lesson 1.4 – Refine Your Foundation

Refining My Foundation

Lesson 1.5 – Determine Whether Running Your Own Business Resonates with Your Foundation

Will My Foundation Support My Business?

Assignment/Action Step:

Estimated Module Completion Time:

5–7 hours

~1 hour

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 2: Big Pictures

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise Two

Lessons & Activities:

Lesson 2.1 – Identify Elements of Your Life's Big Picture

What Makes Up My Big Picture

Lesson 2.2 – Add Flavours, Colours and Sounds to Your Big Picture

Flavours, Colours and Sounds for My Big Picture

Lesson 2.3 – Put Together the Big Picture for Your Business

The Big Picture for My Business

Lesson 2.4 – Write Five Specific Objectives for Your Business

specific target

specific behaviour

specific responsible person(s)

Five Business Objectives

Lesson 2.5 – Assign Due Dates to Your Objectives

Objectives with Due Dates

Assignment/Action Step:

Estimated Module Completion Time:

5–6 hours

~1 hour

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 3: Time Management

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise Three

Lessons & Activities:

Lesson 3.1 – Write Out Your Present Schedule

My Weekly Schedule, First Draft

Lesson 3.2 – Identify Your Foundation and Big Picture Elements to Include

Top Three Foundation and Big Picture Goals

Lesson 3.3 – Eliminate Time-Wasters

Losing the Time-Wasters

Lesson 3.4 – Commit to Business and Personal Time

Time Commitments

Lesson 3.5 – Rewrite a New Schedule

My Rewritten Schedule

Assignment/Action Step:

Estimated Module Completion Time:

5–6 hours

~1 hour

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 4: Marketing — Five “P”s in a Pod

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise Four

Lessons & Activities:

Lesson 4.1 – Consider Your Product from Your Customers' Perspective

RAW

Relevance

Accessibility

Worth

The RAW Truth about My Product

Lesson 4.2 – Work Out the Pricing of Your Product

Making Price Meet Value

Lesson 4.3 – Design Your Delivery Channels (Propagation)

Product Propagation

Lesson 4.4 – Determine Your Position in Customers' Minds

Position Analysis

Lesson 4.5 – Plan Your Promotional Strategy

Promoting My Product

Assignment/Action Step:

Estimated Module Completion Time:

5–6 hours

~1 hour

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 5: Money, Money

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise Five

Lessons & Activities:

Lesson 5.1 – Establish Your Revenues and Expenses

fixed

variable

Revenues and Expenses Worksheet

Lesson 5.2 – Project Trends for Your Business

Spotting Trends

Lesson 5.3 – Predict Outcomes for Your Business

Predictions

Lesson 5.4 – Put Together a Cash Flow Plan

Cash Flow Assessment

Lesson 5.5 – Determine a Strategy for Profit

My Working Budget

Assignment/Action Step:

Estimated Module Completion Time:

5–6 hours

~1 hour

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 6: Finding Customers

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise Six

Lessons & Activities:

Lesson 6.1 – Review Ways to Generate Leads

Options for Generating Leads

Lesson 6.2 – Profile Your Target Market and Audience

Building My Customer Profile

Lesson 6.3 – Develop the Message for Your Profiled Customer

The Message to My Profiled Customer

Lesson 6.4 – Match Media to Your Customers

Matching Media to My Customers

Lesson 6.5 – Develop a One-Year Strategy for Lead Generation

Media and Months

Assignment/Action Step:

Estimated Module Completion Time:

5–6 hours

~1 hour

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 7: Keeping Customers

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise Seven

Lessons & Activities:

Lesson 7.1 – Discover How to Turn Leads into Customers

Pitch Development

Lesson 7.2 – Create a Customer Service Solutions Strategy

Customer Service Solutions

Lesson 7.3 – Connect the Dots to Enhance Lifetime Customer Value

Lifetime Value Connect-the-Dots

Lesson 7.4 – Turn Your Best Customers into Evangelists

Making Evangelists for My Business

Lesson 7.5 – Stay on Your Customers' Radar Screens in a Positive Way

Keeping on My Customers' Radar Screens

Assignment/Action Step:

Estimated Module Completion Time:

5–6 hours

~1 hour

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Module 8: Putting It All Together

Estimated Time: 2 hour(s) for mastery; one hour for essentials.

Key Points to Emphasise:

Module Title:

Module Overview:

Essentials Exercise Eight

Lessons & Activities:

Lesson 8.1 – Determine What You Need to Manage to Be a Success

Managing for Success

Lesson 8.2 – Determine Where You Need Help

Do I Need Someone Else's Help?

Lesson 8.3 – Identify Your Personal Long-Term Business Strengths

My Long-Term Business Strengths

Lesson 8.4 – Draft Your Exit Strategy

Where

Who

What

Today's Exit Strategy

Lesson 8.5 – Write a Brief Yet Comprehensive, Objective-Based Action Plan

Today's Business Objectives

Assignment/Action Step:

Estimated Module Completion Time:

6–7 hours

~1 hour

Module 1:

Module 2:

Module 3:

Module 4:

5 P’s of Marketing

RAW

Module 5:

Module 6:

Module 7:

Module 8:

Decision Influences Worksheet:

Your Foundation Workbook:

Big Picture Templates:

Objective Planner:

Weekly Schedule Template:

Revenue/Expense & Cash Flow Sheets:

Customer Profile Worksheet:

Pitch Builder:

Customer Service Planner:

Exit Strategy Checklist:

Action Plan Outline:

Free Self-Assessment Quiz:

Business Ideas Guide:

Weekly Newsletter with Tips:

Short Video Series:

Printable Checklist:

Modern Examples and Case Studies:

Technology Basics for Retirees:

Community & Accountability:

Accessibility Features:

Ongoing Support Offers:

Props/Examples Needed:

Printed worksheets (as provided in the workbook)

Scratch paper and pens for demonstrations

Any personal stories or examples relevant to the module

Marketing Assets: Marketing Assets Short Ad Scripts (30–60 seconds)

Ad Script 1 – Find Your Purpose Again

"Are you a retiree looking for more than just quiet afternoons? Imagine turning your passions into a small business that keeps you active and gives back to your community. Our Retiree Small Business Course guides you step by step—from discovering your strengths to launching a purpose-driven venture. Join us and reinvent retirement with purpose and profit."

Ad Script 2 – Supplemental Income Made Simple

"Worried your pension isn't enough? You can earn extra income without risking your savings. In our easy-to-follow course for retirees, you'll learn how to pick the right business idea, manage money wisely and attract customers. It's practical, low-risk and designed just for you. Start your journey today."

Ad Script 3 – From Doubt to Doer

"Do you feel intimidated by modern business? You're not alone, and you don't have to do it on your own. Our retiree-friendly course offers clear lessons, printable guides and personal support to help you build a business step by step. Gain confidence, earn supplemental income and enjoy your newfound independence."

Lead Magnet – Free 5-Day Starter Plan for Retiree Entrepreneurs

Download our free 5-day starter plan to jump-start your retiree business journey. Each day includes a short exercise from our Essentials course, reflection prompts and practical tips. By the end of five days you will have:

Identified your default settings and assessed your entrepreneurial readiness.

Drafted a big picture for your life and business.

Started to restructure your schedule to make room for your new venture.

Outlined your product idea and examined its value from a customer perspective.

Sketched a simple marketing and lead generation plan.

Course Description for Landing Page

Transform your retirement into a new beginning with our comprehensive Retiree Small Business course. Designed specifically for people aged sixty to seventy-five, this program guides you through every step of starting, growing and sustaining a micro-business—from understanding your personal values and creating a compelling vision to mastering time management, marketing, finances and customer relationships. Available in a full eight-week mastery track or a condensed ten-hour essentials track, the course combines practical lessons, engaging exercises and supportive materials to ensure you walk away with a complete business plan and the confidence to make it happen.