



# A Step-by-Step Guide to Mapping Your Business Growth

*DIY Strategy Day with Michele Williams, Owner of Scarlet Thread Consulting*

©Scarlet Thread, LLC 2025



# Watch the Introduction Video for Your DIY Strategy Day

- ▶ Why Strategy Days Matter
- ▶ What to Expect from This Guide
- ▶ How to Prepare for Before, During, and After
- ▶ Time Needed: 3 Hours

***Who This Is For?*** Growth-minded interior designers ready to lead their business with intention.



# Before You Start Your DIY Strategy Day

## *Block the Time*

- Schedule a half or full day on your calendar
- Choose a space outside your normal work zone to inspire new thinking

## *Set the Stage*

- Turn off all notifications
- Treat yourself (coffee, good breakfast, music—set the tone)
- Invite a trusted accountability partner if desired

## *Do the Pre-Work (write or revisit):*

- Your Personal Why
- Your Company Why
- Vision Statement (aspirational + future-focused)
- Mission Statement
- Core Values
- Culture Definition
- 3-Year Goals (in any order—just get them out!)





# During Your DIY Strategy Day

“*Strategy without execution is a daydream. Execution without strategy is a nightmare.*”

## Start With You

Dig deep into your “Personal Why” and apply that to your “Business Why”.

## Shape the Vision

Use your company why to craft an aspirational vision. If your vision already feels true, it's not big enough.

## Define Your Values

What's most important to your company? How do those values show up in your work?

## Clarify the Mission

The work that must be done to fulfill your why and vision.

## Capture the Culture

Based on your values, what's the atmosphere and standard you want to build?

## Identify the Gap

Where you are today → where your vision wants you to be.



# During Your DIY Strategy Day

*“Strategy without execution is a daydream. Execution without strategy is a nightmare.”*

## Now It Is Time to Build the Roadmap

Break down your goals:

- By Year
- Then by Quarter
- Then by Month

Assign goals/tasks:

- Set start and end dates
- Define what success looks like clearly
- Assign owners (who is going to do this work?)



# Keys to a Successful Strategy Day

- Don't rush the deep thinking
- Invite someone to ask questions and help clarify
- Use a Strategy Tracker Sheet to monitor progress
- Be flexible—realign goals if they no longer serve your vision
- Build in accountability with yourself and your team
- Review quarterly and adjust as needed





# After Your Strategy Day

- Input goals into a tracker or project management system (Asana, Click-up, etc.)
- Share your plan with your team (if applicable)
- Set your next review date (once a month ideally)
- Revisit and revise regularly
- Re-anchor your work to your vision often



# Example Business Strategy

SCARLETTTHREADCONSULTING

## Personal Why

I grew up in a house that was always in transition—half-finished projects, hand-me-down furniture, and never quite feeling like it was ours. I remember promising myself that one day, I'd create a home that felt calm, beautiful, and whole. Now, I help other families do the same—because I know how much the environment around you can change how you feel inside.

## Company Why

We exist to help families fall back in love with their homes by creating spaces that reflect who they are and support how they live.

## Vision Statement

In 3 years, Willow & Sage Interiors is the go-to design studio for full-home renovations in the Southeast. We serve 20+ ideal clients per year, have a refined client experience, a team of 3 full-time employees, and consistently generate \$1.2M in annual revenue with 30% net profit. We are known for our thoughtful, livable luxury aesthetic and a smooth, enjoyable process that clients rave about.



# Example Business Strategy

SCARLETTTHREADCONSULTING

## Core Values

- Clarity in Communication
- Beauty with Purpose
- Respect for Every Home
- Excellence Over Perfection
- Honesty in Every Step

## Mission Statement

To deliver personalized, full-service design that honors our clients' stories and supports their lifestyle—while creating a business that supports the lives of our team.

## Company Culture

Supportive, high-performing, communicative, and organized.

We value thoughtful process, celebrate wins, and take ownership when things don't go as planned. Everyone on the team contributes meaningfully.



# Example Business Strategy

SCARLETTTHREADCONSULTING

## Long-Term Goals (3-Year Horizon)

Build a \$1.2M revenue firm with 30% net profit, Hire and retain a design assistant and operations manager, Transition to full-service only; phase out e-design, Develop a repeatable client experience system, Create a marketing plan that runs without daily oversight, Redesign the website to align with new positioning.

### Year 1

- Reach \$650K in revenue
- Refine offer to full-service only
- Hire part-time design assistant
- Track profit margins on every project
- Audit and revamp client process from inquiry to install
- Begin planning new website (design brief, budget, timeline)

### Year 2

- Hire full-time operations manager
- Launch new website
- Refine back-end systems for onboarding, billing, sourcing
- Develop and schedule consistent blog + social media content
- Reach \$950K revenue

### Year 3

- Onboard third team member (junior designer)
- Reach \$1.2M revenue with 30% net profit
- Build referral network of 5–10 aligned vendors and real estate partners
- Invest in branding video + elevated photography



# Example Business Strategy

SCARLETTTHREADCONSULTING

## Year 1 Quarterly Breakdown

Build a \$1.2M revenue firm with 30% net profit, Hire and retain a design assistant and operations manager, Transition to full-service only; phase out e-design, Develop a repeatable client experience system, Create a marketing plan that runs without daily oversight, Redesign the website to align with new positioning.

### Q1

- Map ideal client journey from inquiry to offboarding
- Begin financial tracking system with monthly check-ins
- Define and document all design phases
- Set revenue target of \$160K this quarter

### Q2

- Hire part-time design assistant
- Offboard last e-design client
- Draft content calendar for marketing through Q4
- Set revenue target of \$170K

### Q3

- Begin internal SOP documentation
- Schedule brand photoshoot
- Begin planning new website project
- Revenue target: \$160K

### Q4

- Analyze total annual revenue and profit
- Build 3-year strategic tracker for internal use
- Plan Strategy Day for next year
- Revenue target: \$160K



# Example Business Strategy

SCARLETTTHREADCONSULTING

## Accountability Tracker (Q1 Example)

Task	Owner	Start Date	End Date	Success Criteria
Map client journey	Lead Designer	Jan 5th	Jan 12th	Full process written & stored in SOP folder.
Set up financial tracker	Bookkeeper	Jan 8th	Jan 15th	Monthly report auto-shared on 15th
Document phases of design	Lead Designer	Jan 12th	Jan 25th	All phases outlined with timeline, fees, and deliverables
Revenue tracking	Owner	Ongoing	Quarterly	Hit \$160K or more by March 31



# If you did the DIY Strategy Day and find yourself thinking...

“I just need a second set of eyes on this”?

“Okay I did it but how do I implement?”

“Who is going to hold me accountable?”

“What if things change in my business?”

Schedule a free call with Michele to see if the 1:1 Strategy Coaching Program is the right next step for you.

Click [here](#) to schedule.

©Scarlet Thread, LLC 2025

## Program Overview

- Full Strategy Day with Michele
- Monthly or Quarterly 1:1 Coaching Calls
- On-Demand Support from Michele Between Sessions
- Access to the Private Designers' Inner Circle Community
- Complimentary Enrollment in All 8-Week Intensive Coaching Programs
- Ticket to Our Annual In-Person Event (September)
- One-Year Access to Metrique Solutions
- Opportunities for Social Media Collaborations and Podcast Features



Working with Michele over the past five years has transformed my business. Her expertise as a strategic and financial coach brings clarity and focus to every session. While I've been in her annual membership, dedicating a full day to a one-on-one strategy session was essential.

We connected my vision, operations, and financial goals into a clear, actionable plan for 2025 and beyond.

Michele helped refine my offerings, revisit my mission, and map out pricing and forecasting—guiding every step with precision.

Stepping away from the day-to-day to focus on big-picture strategy was invaluable. I left feeling aligned, confident, and ready to execute. Michele is truly an essential partner in my business journey.”

*Rose Zefforino*

Owner of Z. Domus Designs

