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Courses

ACE for FAST: Strategic Planning for Small Businesses

Course Page: <https://courses.cfoperspective.com/courses/ace-for-fast>

Small business strategic planning should quickly lead you from defining where you are going to deciding how to get there. Getting there takes a well-built strategy and implementation plan. Get planning and management tools with the basics of how to use them.

Business Loan Basics

Course Page: <https://courses.cfoperspective.com/courses/business-loan-basics>

Business loans are a vital source of funding for small businesses. The process can seem complicated and difficult. Let me give you the basics to be more prepared and confident to get the loans you need.

Create a Cash Flow Projection with 12MO Template

Course Page: <https://courses.cfoperspective.com/courses/create-cash-flow-projection-basic-templates>

Learn how to create a cash flow projection with a basic template for Excel/Google Sheets. I walk you step-by-step on how to fill it out using an example company.

Creating Value for FAST: Business Success from Shared Value

Course Page: <https://courses.cfoperspective.com/courses/creating-value-for-fast>

You get what you value when you provide value to others. Business success comes from creating value for owners, customers, and employees. In this program, you'll identify exactly what each of these three groups value and how to increase that value - and your success.

Entrepreneurial Finance: Small Business Financial Management Basics

Course Page: <https://courses.cfoperspective.com/courses/entrepreneurial-finance>

Small business strategic planning should quickly lead you from defining where you are going to deciding how to get there. Getting there takes a well-built strategy and implementation plan. Get planning and management tools with the basics of how to use them.

Improve Your Cash Flow

Course Page: <https://courses.cfoperspective.com/courses/managing-cash-flow>

Reduce your stress and capture more opportunities by improving your business's cash flow. Better cash flow means more growth and more profit.

Marginal Profitability Analysis

Course Page: <https://courses.cfoperspective.com/courses/marginal-profitability-analysis>

Make more profit and avoid costly mistakes with marginal profitability analysis. Marginal profitability analysis gives you decision information for setting prices, product design, and product profitability. It can also help you decide whether to open or close locations.

Structure Selection

Course Page: <https://courses.cfoperspective.com/courses/business-structure-benefits-and-options-for-entrepreneurs>

This course explains the benefits business structures can provide and lists the pros and cons of popular structures.

Downloadable Tools

7 Ways to Get the Best Loan Pricing

This handy guide has 7 tips that could save you thousands in loan interest costs. You have more bargaining options than you think when negotiating on a loan. Negotiate from a position of strength.

Aspirations and Purpose Worksheet

The Aspirations and Purpose worksheet helps you clarify your personal aspirations and business purpose to set the direction for your company. Many owners chase too many good things without committing to what's best for them. An old saying is "The person who chases two rabbits catches neither." Wouldn't it be better to get the largest amount of what you want the most?

Business Growth Checklist

This growth checklist will guide you through the critical questions you must ask to decide whether growth is right for you and whether you are ready for profitable growth. Business growth provides many benefits, but you must be ready for growth to capture those benefits. Growth can also come with many drawbacks, especially if you aren't ready for growth. Business owners are often surprised by some of these drawbacks.

Cash Conversion Cycle Calculator

This worksheet will calculate your cycle conversion cycle time. Even better, you can estimate how much your cash and profits might go up if you reduce your cycle time. Reducing your cash cycle time increases your cash balances and profits. It may be one of the easiest ways to do that.

Cash Flow Projection Template

This is a cash flow projection template in Excel with 12 projection periods. Cash is the lifeblood of your business. Planning out your cash is key to identifying when you'll have the cash to invest in the company or to distribute to owners. It also helps you avoid cash crunches.

Cash Metric and Trend Analysis

This workbook allows you to quickly calculate your current ratio and quick ratio. It also has a worksheet to do a trend analysis of your past cash flow. Your past cash balances are graphed out to easily see cash flow trends. A good cash projection helps you anticipate if you need to get cash from loans or investors. This tool helps you analyze your cash ratios and look at past cash trends to help project future cash trends.

Cash Metrics Guide

This guide summarizes the key cash flow metrics. It also has examples of how to calculate the metrics, what levels are considered good, and explanations of how the

metric fits into cash flow management. Cash is the lifeblood of your business. This guide shows you the key metrics to monitor the pulse of your cash.

Customer Dreams Worksheet

In this worksheet, you'll identify the dreams of your customers and how you fulfill them. You can then clearly communicate the value you provide to customers. Common selling wisdom is to sell benefits, not features. People care most about how their life will be better. The features are just proof that your product or service can deliver the benefits. Carmine Gallo, the author of *Talk Like TED*, summarizes this as "Sell dreams, not products."

Employee Dollars - Benchmarking

This is a set of three tools: (1) Employee compensation benchmarking instructions, (2) Job benchmarking worksheet, and (3) Benefits worksheet. You want to attract and retain the best talent. One part of that is to give them what they value in pay, bonuses, and benefits. What's fair? Your employees will judge the fairness of their compensation partly by what similar jobs pay at other companies.

KPI Dashboard

This is an easy-to-use KPI dashboard for tracking your key performance indicators (KPIs). KPIs are the key measures of your success. A KPI dashboard provides clarity and accountability to turn goals into action. You get regular information about whether your company is on track to accomplish its goals. Use the dashboard to communicate the key metrics to staff and inform them of the company's progress.

Klontz Money Scripts Inventory (KMSI)

The Klontz Money Script Inventory (KMSI) helps you identify money beliefs that may be sabotaging your personal and business finances. This science-backed assessment can help you reduce beliefs that hold you back financially.

Loan Documents to Gather Checklist

Use this handy checklist to track the documents to gather when you apply for a loan. Finding the documents you will need to apply for a loan can take some time. Use this list to be ready when the bank asks for these documents. Being ready means you don't slow down your loan from being approved and getting your cash.

Minimum Distribution Calculator

This simple calculator provides a quick estimate of how much cash you need to distribute from your company for personal cash needs. Your company's growth is partly determined by how much cash you can reinvest in the business. Cash from the company that you need for personal needs isn't available for company growth.

Mission Statement

This worksheet helps you define the mission of your business. Your mission is a short summary of what your company does to achieve your vision. Defining your mission will create the boundaries and criteria for choosing your company's priorities. Your mission says what you do and what you don't do.

Objectives and Tasks Worksheet

The worksheet will help you map out your quarterly objectives (a.k.a. goals) and the tasks to achieve those objectives. Analysis without action is worthless. This helps you plan out how you'll implement your plans to achieve your goals.

One Page Strategic Plan

This simple PDF template allows you to quickly define in one page the key items for a strategic plan. Small business strategic planning doesn't have to be complex. The definition of strategic planning is determining where you're going and how you're going to get there. That's really all there is to it. What makes your strategic plan effective is how it helps you make the right decisions. Your strategic plan sets the boundaries and guidelines for all your tactical decisions. It's your criteria for success.

Owner Tasks - Delight and Value Assessment

This worksheet helps you assess whether you should do one of three options for each of your tasks: keep it, delegate it, or stop doing it. You have a limited amount of time and energy. When you want to do something new, you must stop doing one of your current tasks. This assessment helps you decide which tasks to stop.

Price Change Analysis Worksheet

The price change analysis template shows you whether changing your price will increase or decrease your profits. More importantly, it shows the price or volumes you need to break even on your price change. Many owners make price changes without calculating the key drivers of the profitability of the price change.

Pricing Strategy Worksheet

This helps you set your pricing strategy. You list the pricing strategy of each product over time and how each product fits with other products to guide customers from low-value to high-value products. You'll outline how all your products work together to build value for your customers that leads to more sales and higher profits to you.

Prioritization Pack

The Prioritization Pack gives you a head start on using four methods to prioritize your goals and tasks. The pack includes instructions for each method. It has fillable PDF forms and Excel workbooks to use as templates and make calculations easier. Carefully choosing what you will do is time well spent. When everything is a priority, nothing is a priority. Employees are scrambling to keep up with too many tasks. Everyone is frustrated by the lack of direction. Deadlines are missed.

Start, Stop Continue Template

This fillable PDF template is a quick way to summarize what you should start, stop, and continue based on ideas from you, your customers, and your employees. Start Stop Continue allows you to identify: (1) What you should start doing, (2) What you should stop doing, and (3) What you should continue doing. Use this exercise to stop doing things that destroy value to focus on those that provide value.

Sustainable Growth Rate Formula Calculator

This Excel workbook calculates the formula for you. Better yet, it looks at what your sustainable growth rate formula amounts are at varying Return on Equity (ROE) rates and owner distribution rates. Growth can mean opportunity and profits. However, your financial risk increases when you chase too little or too much growth. How fast can you grow? What are the keys to growth? The answers lie hidden in the sustainable growth formula.

SWOT Analysis Template

SWOT analysis is a simple but powerful method to assess your company and competitive environment. This knowledge leads to superior strategic plans. The SWOT template pack comes with five documents to help you quickly conduct a SWOT analysis: (1) Instructions on how to use the documents, (2) SWOT List Worksheet – Easy-to-use form to list items for each SWOT quadrant. You also assess the importance of each item and how easy each is to use, (3) Prioritization Matrix – Use this

to identify the ideas that best lead to success. (4) SWOT Matrix – Word Version and Fillable PDF Version, (5) Three D's Worksheet.

Total Compensation Template

Use this template to show each employee everything you provide to them. The template totals all the pay and benefits an employee receives. When employees can see everything you provide to them, they are amazed at the total value of it. Employees who know the total compensation they receive are less likely to forget the benefits they receive from you when considering offers from your competitors. It's easy for some things you provide to be forgotten or taken for granted. Make sure to take credit for everything you're doing for your employees.

Vision Formation Worksheet

This worksheet helps you define the vision for your business. Your vision is what you want your company to look like in 5-10 years. A popular saying is "When your vision is clear, the decisions are easy." Your vision sets the long-term direction for your company. It often inspires and motivates.

Ways to Project Numbers

This guide shows you the different ways to project numbers for budgets, cash flow projections, etc. Many times when I work with clients on cash flow projections, they don't know the different methods for using past numbers to project accurate future numbers. This guide talks you through the most popular ways to do this.

Videos

Are You Ready to Grow?

This video will guide you through the critical questions you must ask to decide whether growth is right for you and whether you are ready for profitable growth. Business growth provides many benefits, but you must be ready for growth to capture those benefits. Growth can also come with many drawbacks, especially if you aren't ready for growth. Business owners are often surprised by some of these drawbacks.

Calculating Your Cash Conversion Cycle

This explains how to calculate your cycle conversion cycle time. Reducing your cash cycle time increases your cash balances and profits. It may be one of the easiest ways to do that.

Cash Flow Planning for 2021

Solid strategic planning leads to profits. The core test of the profitability of your plan is a cash flow projection. In this webinar, I'll show you the insight you can gain from a cash flow projection.

Couples with Companies

This video will help you: (1) Understand financial conflict between couples, (2) Explore what we want from money (3) Identify tools and processes that reduce conflict or make it more productive, improve your relationship, and increase your business success.

How Financial Leverage Magnifies Returns - and Risks

This video explains the rewards and risks of using financial leverage. Financial leverage is the use of debt financing. I saw many business owners make mistakes with leverage when I worked in banking. Leverage can increase the return to the owners. It also increases the chances of a cash crunch. Learn how it does both.

How to Avoid Decision-Making Mistakes

This video explains common business decision-making mistakes and how to avoid them. We all fall for business decision-making errors. Our emotions and snap judgments influence our business decision-making process more than we know. In fact, we are more likely to resort to a snap judgment when faced with a complex business decision.

How to Create a Cash Flow Projection

This short video explains the basics for building a cash flow projection. Cash is the lifeblood of your business. Planning out your cash is key to identifying when you'll have the cash to invest in the company or to distribute to owners. It also helps you avoid cash crunches.

Increase Your Cash by Decreasing Your Cash Conversion Cycle

This video shows how your profits can go up if you reduce your cash conversion cycle time. Reducing your cash cycle time increases your cash balances and profits. It may be one of the easiest ways to do that.

Pricing Strategies for More Profit and Customer Engagement

You'll learn: (1) The two critical questions to answer for each of your major products/services, (2) How your products guide customers through a sales funnel to higher profit products, (3) The four pricing strategies in the pricing strategy matrix, (4) The three biggest pricing mistakes, and (5) The toughest sale you'll have to make

The Benefits and Problems of Business Growth

Business growth provides many benefits, but you must be ready for growth to capture those benefits. Growth can also come with many drawbacks, especially if you aren't ready for growth. Business owners are often surprised by some of these drawbacks. This video will guide explain the benefits and unanticipated pitfalls of growth.

Power Tools

Note: Power Tools are services that are only available to FAST members at a deeply discounted rate.)

Custom Cash Flow Projection Template

Learn how to create a cash flow projection with a template that's customized to your chart of accounts. I'll also join you for a one-hour Zoom session to help you create your projection. Get the custom template, 1 hour of consulting, and training for \$90.

Custom KPI Dashboard

You will send a worksheet to me that tells me your key metrics and your targets for those metrics. I'll take that and build a dashboard for you in Excel. I'll build a custom dashboard for you for \$90.

Consulting

Want one-on-one customize help for a specific need? Want to customize a tool from FAST for your situation? Want Rob to facilitate meetings with your staff on concepts

from the CFO Perspective website like strategic planning? My consulting time is focused on FAST members like you. I'll work directly with you for only \$100/hour. This access to me at such a low rate is one of your benefits as a FAST member.

Quarterly Coaching

Get quarterly one-hour calls with unlimited email access for \$497/year. The standard agenda for our calls is: (1) Review financial statement trends, (2) Review prior quarter goals, (3) Set next quarter goals, and (4) Topic of your choice: choices include financing decisions, pricing decisions, budgeting, setting performance targets, etc.

Customer Survey

I'll host your customer survey on my website. I'll guide you through developing the survey questions and emails to your customers. Get your survey for \$249.

Employee Survey

I'll host your employee survey on my website. I'll guide you through developing the survey questions and emails to your employees. Get your survey for \$249.