

*Meet Shanna ... The untold stories*

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Hi guys, Shanna here! Thanks so much for tuning in today. I'm so excited to share more of my story with you guys. While many of you know the highlights, I wanted to share the real behind the highlight reel, and answer the questions you've been asking:

“Why did you quit social media?”

“Why did you quit your business?”

“What made you decide to come back?”

“How did you transition from service based to product based”

“Will you peace out again?”

And of course... the numbers.

Spoiler Alert: taking a year off, watching from the sidelines of a global pandemic and having my daughter has renewed my passion for entrepreneurship and reminded me why I started this business in the first place. I believe entrepreneurship gives you freedom of time and freedom of money like no other career can and I am beyond blessed to have the opportunity to help others build a business *purpose-built* around the lifestyle they want.

Dolly Parton says “Never get so busy making a living that you forget to make a life”. That quote has become somewhat of my business mantra and you'll see that as a recurring theme throughout my own business journey.

So let's get into it!

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It was 2011, after working in personal finance for five years, Kyle and I decided to quit our jobs and move to Atlanta Georgia for him to pursue his dream of becoming an aerospace engineer. I was contacted by a private equity firm (think Shark Tank *but not Shark Tank \*wink\**) to come on board with one of the companies in their portfolio - a startup fashion designer. I was her controller, handling finance and operations of the business, and worked directly under the CFO of the private equity firm. This was my transition in the corporate finance world and my first dip into the world of creative entrepreneurship.

When I began working there the CEO wasn't taking a salary from the business and the end of year profit was essentially ZERO. (sound familiar anyone?!). I worked for a year and half with the company revamping their pricing structure and manufacturing costs along with day to day operations and I saw a dramatic improvement. By the time I left both the CEO and her business partner were making over \$6fig salary each. From zero profit to over \$200k in profit in just about 18 months.

Let's just say it: finance is a male dominated industry. But did you know over 40% of small businesses are started and run by females. It was not lost on me that there was a huge need for females in the finance world, I just didn't know *how* to do that. I saw an opportunity, but I didn't yet know I was the one who would step into that need.

While working with the fashion designer showed me the huge need for females in the finance world, it also made me realize I wanted to be out from behind the desk and working creatively instead. So I quit that desk job to start schlepping flowers with Amy Osaba.

It didn't take me long to realize that while I love flowers, floral design isn't my calling. It was my second or third event with Amy, after waiting for hours for the dancing to end, breaking down floral installations (outside, in the dark!) on our hour long drive back to Atlanta (at like 1 in the morning) that I looked at Amy and said "Why don't you have a breakdown crew do this?"

That one question changed my life.

Her response, "I can't afford it".

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For the next year and half I worked with Amy as her controller (without the title!). We completely redid her pricing, proposal process, ordering flowers, hiring freelancers, overhead, operations (and of course a lot of flowers along the way).

When I met Amy she wasn't taking a steady salary from her business. She was a single parent with three boys living in her mom's basement barely making ends meet. Just months before we met she had been told by a traditional financial advisor that her business was bankrupt and she should close up shop. Thank goodness she didn't because within 18 months everything changed. She was taking a \$6fig salary, had purchased her own home (with a pool for the boys!), went from 82% cost with little to ZERO profit to over 50% profit on her events.

Does this sound familiar?

I saw it happen all over again: A few simple (but not easy) steps changed the trajectory of her business *and both of our lives!*

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So that's the part of the story that most of you have heard but there is a lot from that point on that may surprise (and even shock!) you.

Most people don't know that at the time of working with Amy I was applying to grad school to get my MBA and interviewing with a private equity firm. I 100% saw myself becoming a traditional business consultant until I learned that they travel Monday–Thursday every single week meeting with clients all over the world. I could not imagine living that life and never seeing my family.

Amy had a big name in the Atlanta market so it didn't take long for people to start seeing the transformation in her business. I had a lot of other companies start reaching out to me: other floral designers, wedding planners, catering companies, rental companies, paper goods, graphic designers, artists... I was doing my best to help them all and getting paid with gift cards and art on trade.

I had *no idea* how to charge for the work I did, I had no one to ask how to charge ... I felt like I was making it up as I went along. So after realizing traditional private equity wasn't the right path for me I thought “maybe I can just start my own company?”

I applied for an LLC, created a pricing structure, my friend Meredith designed my first logo and business cards, and I put up a squarespace website. November 2013 I was officially in business. TBH (real honest), I just needed to make enough to pay our bills. I thought the business was a short-term solution while Kyle was in school. I *never* foresaw that it would one day change our financial future or be the business that Kyle and I run together.

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So this is going to be *loooong* story if I keep going at this pace. So let's skim through the next couple of years.

I worked with a lot of clients doing 1:1 work and I started an annual planning retreat called Blueprint Retreat (now known as Blueprint Summit). I saw businesses completely transformed

by adjusting pricing, creating a sales goal, putting parameters for spending *aka* creating a money plan!

So many businesses that by the end of 2015 I could no longer keep up with the demand. I was charging clients upwards of \$20k to work with me 1:1. I knew that price-point wasn't doable for a lot of businesses so Kyle and I started brainstorming how we could duplicate myself.

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You know how this story goes » The Blueprint Model is pretty infamous at this point! But at the time online courses were still pretty new (at least I didn't know of anyone doing it but Marie Forleo!) We were back to those beginning days of figuring it out on our own. I had no idea how to price a course let alone launch one! I had no email list and at the time was still posting pictures of my dog on Instagram (this was before the days of Instagram really being a marketing tool).

Kyle and I sat down with a camera and a bunch of notes and simply recorded my process. I didn't realize how revolutionary the idea of "core motivators" and building a business model around your definition of success, "Defining Enough" and setting a sales goal around your need, wants, and big crazy dreams would be. I just shared from my heart, and of my ten years of working with business owners had taught me about the numbers.

We prayed for 35 students that first round. The course was \$1997 so \$70k in revenue. Ps. I had no idea how unheard that is for a first launch. We were hoping to take a three-month road trip in celebration of Kyle graduating with his engineering degree and that money would cover our income needs while we were away. That's how we initially set that goal.

We sold 54. \$108,000 in revenue our very first launch. I believe my email list had 350 people on it.

This industry was hungry for money training from someone who *gets* it. Being a female, being a mom, being a creative --- doesn't follow the traditional business path, and I was (and still am) beyond blessed to have stepped into that role.

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In 2017, we launched The Blueprint Model again and had over 100 students join. \$200k in revenue. This program changed our financial lives. We were on an absolute high! Kyle and I

were working together in the business (he was also working part time as a contract engineer). We had just built a home in Tennessee. I was still serving clients 1:1 and *loving* working with students in The Blueprint Model.

But sadly, this is where the story shifts.

Now I want to be very careful as I share this next part of the story. I honestly wasn't sure if I'd ever share this part publicly but it was a turning point for me and an experience that shaped the last few years so I think it's important to help frame the rest of the story. I recognize that every story has two sides. This is just one of them. I share with you now not to demonize anyone or put myself in the "I'm perfect" camp, but simply to share how this made me feel,

Let's briefly rewind back to 2014 to frame the story. I was contacted by a business owner not making any money and desperate to have more time with her family. She needed a business rescue, My specialty! I spent the next two (plus) years working with this client revamping her business from the ground up. From website design to logo to the way she priced proposals. Thousands of hours and late nights caring for her and her business as I would my very own. I cheered when that first paycheck hit her personal bank account. From zero profit and no paycheck, to over \$6k fig in profit and a steady paycheck ... I watched as the process I created transformed yet another business and more importantly someone's life.

Fast forward back to 2017. At this point I'd been in the finance industry for over 10 years and had worked with thousands of entrepreneurs. I was just coming off a big launch of The Blueprint Model as well as my Pricing for Creatives course with If I Made. It was all amazing, but I was tired!

It was at this moment I learned that this client of mine (who I thought had become a dear friend) was moving forward with her own online course sharing her personal business transformation; from not being able to pay herself to building a profitable business. The nitty gritty details and content that I had spent countless hours creating in the two years I worked with her.

Now hear me say, it wasn't the fact that she was creating a course. I knew she was going to create a course, Kyle and I even offered to help if she needed us. It was *the content* that was the problem. While yes this was her story, it was my story too. My process, my tools, my work. A template I created, that she followed well. Not a template she created. It wasn't hers to sell.

At the time I had no idea about intellectual property or contract law or copyright. I was completely blind-sided. I never expected a floral designer to become a business coach and talk about money. In the finance world, to give advice about money is a huge responsibility. It takes degrees, and licenses, and loads of experience.

For someone to take the pricing guides I created, financial spreadsheets I perfected, workflows and processes I developed, To share content that originated with me as their own creation ... Was devastating. But to use my very words, my “Shanna-isms” ... broke me.

I felt my identity had been stolen.

I knew it wasn't ok. I just didn't know what I could do about it.

I was forced to spend a year learning about legal rights, intellectual property and feeling like I needed to build a fence around myself, my family, and the process I had spent *years* creating.

Have you seen the movie, *The Founder*? I watched that movie just months after all this happened and cried. I watched as the McDonald brothers perfected their process out on a tennis court only to be hood-winked by a master salesman. I felt like I had been Ray Croc'd. I saw myself in the McDonald's brothers, running around on that tennis court for 10 years in finance, perfecting my process, pouring my heart and soul into the work I did only to have a master of sales come in and take credit for it all.

This experience became a dark cloud over me. I became full of bitter and angry feelings and that's not me. I became leery of people; unsure of who was safe. Not sure of who could be trusted. I no longer felt we were all *for* each other, but instead it was every woman for themselves. I felt I had to wall myself in.

My friend Erin Loechner once said to me “We talk about glass ceilings, but I can't help but wonder who all that glass is falling on.” In the end, the passion and enthusiasm I had for helping others got buried under a pile of hurt feelings and fear.

I decided to quit social media (for the first time). The industry was noisy and I needed time to heal. For my mental health I felt this was the best. That 2017 launch of *The Blueprint Model* gave us enough income to live off for the year so I knew if my business decreased (which it did) we would be fine financially. At that time instagram was bringing in 70% of my website traffic. many of my 1:1 clients and BPM students found me through that platform. It was scary to leave, but I wanted to figure out a way to build an audience that felt more sustainable. I put my head

down and committed to staying off Instagram until my audience reach through other marketing channels (ie: word of mouth, pinterest, blogging, seo) were at least equal to those Instagram numbers. This took me a year and a half to do but I will tell you it was the best thing I did for my business and my mental health.

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In 2018 we launched The Blueprint Model again and did \$480,000 in sales *without social media*. At the time it was just me, Kyle (working part time), and a part time assistant. I had never invested in Facebook ads except maybe \$500 dollars in total to boost a few posts. The business was doing *amazing!* I loved our students, I loved the Blueprint Model... on paper it all looked awesome. But we were at a crossroads. To serve that many students (and I was still taking on 1:1 clients), I either had to go all in and build that quote on quote “empire” or start limiting how many people could buy the course. You guys know, in the business world, *more* is better. I drank the koolaid and decided it was time to build the team. I went all in and hired five full time employees plus all the contractors we worked with. In 2018 we launch My Blueprint Year (my annual planning course and planner) as well as Blueprint at Home (my personal finance course for entrepreneurs). Easy to see why, I was exhausted. I thought hiring a team would make my life easier, but it just shifted my workload. I spent most of my day working with and managing the team, so I was spending most of my nights doing *my* actual work, creating content and filming with Kyle.

I was living so far from that “business built for life” philosophy I didn’t know what to do. I begged God for a rescue.

And He did, but of course not in the way I expected.

In December of 2018 Kyle told me that he’d like to pursue aerospace engineering full time and there was one company he dreamed of working with, Cirrus aircraft. Cirrus had two locations: my hometown in Knoxville Tennessee and the other in Duluth, Minnesota. Ironically all engineers were based in Minnesota. He applied, we both thought it was a long shot, and within a matter of weeks he had a full-time job offer and we were flying to Minnesota to find a house. It was -9 when we landed in February 2019.

We both knew that Kyle taking a full time job would change the business and our family dynamics. Though Kyle didn’t officially join the company until 2020, it could not have run without him and our home couldn’t run without both of us cooking dinner and going to the grocery store. After hours of talking, months of prayer, and hundreds of tears we decided to

close the business. I wanted to take care of our home and family (and we dreamed of having a baby), and Kyle wanted to be the main income earner.

I let all my team go.

We launched The Blueprint Model one last time. Saved up enough money for me to take a year off work completely.

And we closed the doors ... *I thought for good.*

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People ask me all the time why I didn't just take a year off, why I had to close the business entirely. And the absolute truth is that I thought I was done. We even considered selling the business and had discussions with several potential buyers (which I'm so glad we ultimately decided not to do).

What I teach in The Blueprint Model is absolutely how I live my life and build a business. I believe that with the fundamentals of pricing, sales goal planning, financial forecasting, spending, marketing and vision casting-- any person can build any business. And I believe the same for myself. I knew I didn't want to go back to a 9-5 job, I know I will always be an entrepreneur at heart. I also knew that I had one year to figure it out. I left the doors open for an entire year to explore other passions. I thought about being a personal trainer and landscape architect. I deemed it "the year of curiosity" ...

And then a global pandemic happened.

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2020 changed everything.

I sat on the sidelines as my entrepreneurs friends had to think fast, get scrappy, pivot and adjust. I saw how the philosophy of "defining enough" -- knowing your numbers in and out helped hundreds of my students survive 2020 in their personal and business finances. And after about six months of completely stepping away I felt that passion that had been lost long ago start bubbling up again.

I believe I can teach any business owner to make six-even seven- figures with their businesses. The numbers, I can do. But what I had to live out myself is that you have to have courage to build it in a life-giving way.



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In July of 2020, Kyle and I came to the same conclusion at the same time. That this business was what we were meant to do *together* all along. Not just for the financial freedom and freedom of time entrepreneurship gives but also ... what better legacy than to help thousands of others have the flexibility and freedom that we now have. To travel, yes... but most important to be with our daughter. To watch her grow up. To attend kindergarten graduation. To be able to take off a month in the summer to take a sailing trip if we choose.

Entrepreneurship is *amazing*.

I thank the Lord every day that the time I took off (and having my daughter) renewed my passion, healed my heart, and gave me a renewed sense of purpose.

And that brings us to today.

Kyle and I are beyond *blessed* to work together and design a business that provides the lifestyle we both desire. We count it a true honor to help you do that same! We are on a mission to help business owners around the world understand their money (both in their businesses and in their homes) -- why? So that you too can design a business that supports the life you dream about.

We believe the numbers tell the real story. It's the one metric every business owner needs to know. It's allowed me to quit Instagram (again, and for good!) because that's best for my time and mental health. It allows us to build a schedule that gives us time with our daughter, and realize so many more of the dreams we have for our life.

Thanks so much for listening to my (well our) story. I hope this encourages you along your journey, I'm over here cheering you on and of course we'd be honored to work with you as you build the business of your dreams!

*Shanna*

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