

PLANNING YOUR BEST YEAR EVER!

A workbook to help you review accomplishments, set new plans, and determine best strategies.



This Belongs To:

Planning Your Best Year Ever

As every small business owner knows, if you're not having fun and enjoying your work, it's tough to stay motivated. And if you're not feeling motivated, it's nearly impossible to grow.

So many solopreneurs simply exist, working hard day after day, without ever loving their business, and sometimes even coming to resent the very things you used to enjoy.

Or maybe you still look forward to your day-to-day tasks, but have trouble achieving your goals—or even knowing what your goals are. Business feels boring or stagnated, and you can't seem to reach that next level.

Whatever level you're at, whether you're in love with your business today or not, the only sure-fire way to make the next year your best ever is to spend some time reviewing your wins, setting new goals, and planning your strategy for the coming months.

If that sounds overwhelming, don't worry. It's easy, and even fun.

Review & Celebrate the Past 12 Months

Before you can look forward, spend some time looking back. As one vintage ad proclaims, "You've come a long way, baby!" It's time to celebrate!

You have very likely accomplished a lot in the past 12 months, even if some days it doesn't feel like it.

Think back to how you started the past year, and make a list of how you've grown and improved. Keep the following life and business areas in mind as you make your list:

- Family & Relationships
- Financial
- Reputation
- Audience Reach
- Charity & Volunteer Work
- Business Vision
- Spirituality

Then write down where you were then versus where you are now for each of these areas, and any others that are important to you.

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THEN	NOW

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To-Do:

To make this exercise easier next year, set yourself up right from the start.

1. Create a business diary. This can be as simple as a Google calendar or a notebook in your Evernote with a new note for each day or week. Spend a minute or two at the end of every day and jot down anything you might want to remember later. For example, you might make a note about being published in Huffington Post, or getting re-tweeted by Marie Forleo.

You may also want to include things like product launch dates and results, affiliate promotions, ad campaigns and how they perform, and anything else you'll want to remember or reference later.

2. Create a "yay me" file. Here is where you'll record all the good stuff. Glowing emails from clients, exceptional reviews, and even particularly flattering photos should be saved and pulled out whenever you need a pick-me-up.

There are lots of ways to build this file, but don't be afraid to get creative. A fun scrapbook with plenty of color will lift your spirits every time you see it.

Understanding Your ‘Why’

Before you can set goals or achieve anything in your business or your life, you have to understand what really drives you. What is it that truly gets you up in the morning when all you want to do is roll over and go back to sleep? What forces you to pick up the phone to call yet another potential client? What keeps you going, even when you want to give up?

Your “why” is personal. It’s yours alone, and no two why’s are exactly alike. More importantly, there’s no right or wrong “why.”

Perhaps you already know what your why is. Maybe you want to help single moms make a better life for themselves. Maybe you want to earn enough money to retire at 50 and travel the world. You might want to start a cat rescue, spend more time with your kids, or go on a mission trip to Africa. Maybe you just want to make a million dollars.

Once you know what drives you, every decision becomes easier, so before you start setting goals for next year, let’s spend some time thinking about why you do what you do.

Answer the following questions:

If money and time were of no concern, what would I do with my days?

Looking back at my past year, what events or accomplishments made my heart light up?

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If I lost everything tomorrow, what would I most miss?

If I could trade lives with anyone, who would it be and why?

With these answers in mind, spend at least an hour writing out why you do what you do. (This is not an easy exercise, and not one that can be rushed, so please take your time.)

Your Business Vision

You started your business with a vision in mind. You probably daydreamed about what it would look like as you sat in your day-job office waiting for the clock to tell you it was finally time to go home. Maybe you fantasized about how it would be to work from home as you scraped ice off your car in preparation for yet another cold commute in bumper-to-bumper traffic.

What did it look like, this dream business of yours? How did your ideal days roll out? Where did you spend your down time?

Chances are your vision has changed, but you very likely still have a dream of what you want your business—and your life—to look like.

Spend a few minutes and write out (in as much detail as you can) your short and long-term business and life vision.

1 year:

5 years:

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10 years:

Goal Setting

Now that you know what you want your business and your life to look like, and more importantly, **why**, it's time to set some goals to help you get there.

When setting your goals, keep the S.M.A.R.T. model in mind. Goals should be:

- **Specific**
- **Measureable**
- **Achievable**
- **Results focused**
- **Time-bound**

For example, you might set a goal to earn \$200,000 (specific, measureable and results focused) in 2016 (time-bound). If your earnings in 2015 were \$150,000, then your goal certainly meets the achievable requirement as well, making this a good (SMART) goal.

While “smart” goals are safe and expected, there’s something to be said for dreaming big, too. What if you took your “smart” goal of adding \$50,000 to your income, and followed Grant Cardone’s advice and multiplied that by 10?

In “***The 10X Rule: The Only Difference Between Success and Failure***” Cardone makes the case that the only way to really achieve greatness is to dream bigger and push yourself further by setting goals that others might consider unreasonable.

Try setting at least one goal in each of these areas, and don’t be afraid to take your initial goal and multiply it by 10:

Family & Relationships:

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Financial:

Spiritual:

Charity & Volunteer Work:

Business Growth:

Breaking it Down: Your Year at a Glance

Now that you know what your goals are, it's time to break them down into manageable chunks. It's much easier to think about adding 100 people to your mailing list this week than it is to consider the monumental task of adding 5,000 people this year.

Use the table below to break your big goals into smaller, more manageable pieces.

YEARLY GOAL	MONTHLY GOAL	WEEKLY GOAL

Create Do-Able Tasks

Reaching your goals won't just happen. You have to put in the work in order to achieve new heights.

You've already broken your goals down into monthly and weekly milestones, so now it's time to plan the tasks to reach those milestones. For example, if you set a goal of adding 100 people to your mailing list each week, and you know that your landing page converts at 20%, then you need to drive 500 new people to your page. You might do that by running paid Facebook ads, sharing your URL on Twitter and LinkedIn, or buying solo ads. (In each case, you'll need to test and track to ensure you're spending and sharing in the correct numbers to reach your goal.)

WEEKLY GOAL	TASK TO ACHIEVE	TASK TO ACHIEVE

Resources I Need

No business—or life—operates in a vacuum. You need help. People, tools and training are all critical to your success. Some examples of necessary resources include:

Business Tools

- ☐ Web hosting
- ☐ Mailing list manager
- ☐ Shopping cart
- ☐ Social media presence
- ☐ Landing page creator
- ☐ Webinar host

Business Training

- ☐ Email marketing & list building
- ☐ Facebook ads
- ☐ Blogging/content marketing
- ☐ Technology training

People

- ☐ JV Partners and affiliates
- ☐ Virtual assistants
- ☐ Copywriters
- ☐ Graphic designers
- ☐ Video/audio editors

When you think of your goals and vision for the coming year, make a note about the resources needed to accomplish those goals. Some of them you likely already have, some you will need to research and add to your current list.

What's missing from my business and life that will help me achieve my goals?

Accountability & Support

Aside from the tools and training you'll need to achieve your goals, you'll very likely need support and accountability from others as well.

Who will keep you motivated when you just want to give up?

Who will help increase conversions on your landing pages?

Who will share different ideas and perspectives with you to help increase sales?

As a small business owner, you need a solid support system to help you get the right things done. These support people will include:

- Your spouse or significant other
- Your business partner (if you have one)
- Your mastermind group
- Your accountability partner
- Your business and/or life coach

Which of these do you currently have? Which do you need? What roles will they fill in your goal setting and business growth?

PERSON	ROLE

A Living Document

The goals and task lists you've created are only the beginning. You'll continue to add to them as new ideas occur, and old ones turn out not to work (or you hate doing them, or they've lost their importance).

So don't look at any of these as a MUST do list. Look at them as a CAN do list instead.

Here's the really important thing, though: Do something every day. Pick one thing that will move you closer toward your goals each and every day, and once in a while—say once per quarter—revisit your goals and your vision and ask yourself, “Is this still what I really want from life?”

Then make your decisions accordingly.