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Welcome back to module seven, lesson two. We are in the goals and focus section. We are talking about planning ahead. In this lesson we're going to be talking about annual and quarterly planning and so you can really start seeing the bigger picture in your business and start making some really good decisions and plan ahead. See, I love this quote by Bill Gates that says most people overestimate what they can do in one year and underestimate what they can do in 10 years. Let's make sure that we're filling those 10 years with great intentional plans and making sure that we're using our year in the most effective way.

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Part one of this lesson is the annual planning and I want you to follow along in your workbook because we have a few different layouts for this so that you can really wrap your head around what I'm talking about. So when you're thinking about a really successful year, you're going to first want to consider what's in the life plan. Are there birthdays? are there your partner's scheduled, things that you're dealing with. Are you thinking about a family reunion? Are there other things in life that you really need to consider? Maybe there's a really big landmark birthday like you're turning 30 or you're turning 50 or your partner is really just thinking about those things in your life and considering those your health goals, some of your other goals that you might have. You want to make sure to consider that as you're planning your business life. I don't want you to plan your

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business life first and then feel like you can't really fit in any of the things that are important to your personal life. The other thing I want you to consider after your life consideration is to look at your budget projection from module four. Remember that Easter egg hunt that you did with your dollars, reconciling what you found there and looking at the year ahead or the six months ahead, is really, really important. I don't care if you're doing this at the beginning of the year or if you're doing this in July.

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It really just matters that you're sitting down to do this planning rather than when you're doing it. So planning means that you're setting a plan out, your sketching it out and checking it against the different criteria like life stuff like your financial projections, like the time that you have available to do these things. All of these are really incredibly important in how you make decisions. So in the grid that you have in the workbook, I want you to sketch out when are the times that you're going to be busy with your personal life. Maybe you have children and they're in school most of the year, but during the summer you're a full time mom. I'm guessing that if that's the case, you're probably not going to get as much work done during the summer time, so just be honest with yourself and then match that against the Easter egg hunt that you did in module four.

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So let's move right along to quarterly planning. After you do the annual plan, it's going to be really important to figure out what's the actual plan for the quarter. This is where we dig a little bit deeper. So the annual plan might be just like a high level. Here's where I might do a launch or here's where I might be talking

about this or where I might sell this thing, but ultimately the quarterly plan is where you create the actual plan for how you get things done.

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Here's the deal is that you have to pick three goals per quarter and this is why if you are a creative person, you're probably constantly working on all of the things and the most profitable and the most successful people are the ones who are focused, who are lasered in and dialed in on whatever it is that they're working on, whether it's month at a time or a quarter at a time.

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So my suggestion for you is pick three goals or no more than three goals. It can be two or it can be one, but no more than three goals per quarter. So choose one, two, three goals as your focal points in your quarter. By doing so, you'll be able to make quantitative progress in achieving it. Whether it's making progress on creating something. If you're going to be marketing something, you're going to be able to see the actual progress that's happening and be more likely to be motivated because you're seeing the progress, so go back to that wheel of life that we did and identify the things that you'd like to improve in your business and in your life and as you consider these three goals, it's really important to think about the business moneymaker tasks and put some of the other things that feel like a passion project on the back burner.

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Decide intentionally what to put in the forefront and stick to. This is a challenge for you to commit to something and really put a hundred percent in it and remember that sometimes three goals is going to be way too much. It's going to be way too much to focus on three things because you're probably working on serving your clients. You're probably going to be working on updating something inside of your business, and those can be goals as well to serve your clients well can be one of your goals. So just think about what it is that you want to make progress on. What you want to be doing and ultimately have that written down as one of your three,

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so three goal examples might be I want to launch a podcast and get to 20 reviews to increase my visibility. Number two might be, I want to find to my email sequence and the funnel that the customers get after they purchase to improve the customer experience. Number three might be, I want to enroll 50 people into my membership group.

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Another set of three might be I want to enjoy the holidays with my family, not even work during the holiday season. I want to onboard three new clients. I want to launch the group program and enroll 15 students. These are great examples, right? To be able to dive into these three and focus on the tasks that you'll need to take action on in order to have these things. So another set might be batch content and have eight blog posts that are ready to go and I don't need to touch until I need to hit go. Number two would be I want to pitch 15 podcasts or five per month in order to improve my visibility. Number three might be finalizing all the products for the winter launch and start to create the prototypes. So these are all things that you can actually take action on and make progress towards.

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So write your goals down and if you're thinking, oh my gosh, I have way too many ideas in order to narrow it down to three, I want you to think about what your three are to start, maybe you have a list of five and then you cross out which ones might not be the most relevant right now, or you can park it for later. So this next section is something that I do for my business personally, and this is something that I hope will help you set yourself up for success in any given period of time. I am doing one of the three things, so the prep promoting or execution. So let me talk you through each of these things. So prep is prepping for any content you need in order to launch.

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That's the planning, the strategy, the launch content all should go here, right? And it's a pretty big undertaking to launch something and at the same time as either promoting or prepping, you're probably going to be wanting to create the product or the content. So content creation can be the actual deliverable, whether it's a course or a program or an actual product and whether you're promoting it or it can be a product, right? You want to create it in order to put it onto the world. And then another step is promoting. That's the external part, and this is the period of time you'll want to be promoting the product, making the offer is showing people that you have available or quote unquote launching in the more traditional sense. And then the execution. The execution is you delivering, you shipping, you creating and completing a project, delivering the group program, whatever it is, the execution is whatever the person paid for, you are giving it to them. That's the delivery part.

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So in every business you are going to have these cycles of prep, of promoting and execution and we have a grid inside of the workbook that I use in my business and I hope that you'll see as helpful to set your money up for success. So in this quarter, what are the things that you're prepping, promoting or executing. And for me, I'm not doing all three of these things in one given month. Usually I'm prepping one month and then I'll be promoting one month and then I'll be executing the third month. So it's really like a step by step process for me behind the scenes.

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So spend some time, take a look at it and you might not have anything to fill out right now, but I want you to take a look at it and every time you need to plan your quarter you might want to print this page out for yourself. So I also actually have mine in a quarterly focus doc on in a Google spreadsheet and my quarterly planning allows you to check the annual plan and to make sure that these things actually make sense. So you can put your focus projects on the lefthand side, what are the three things that you're focusing on, and then under each month you can put, I'm doing prep or I'm doing promo or undoing execution and getting really specific about what that means.

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So let's say you're planning on promoting a podcast in April, so you might be prepping the content, you might be prepping the the editorial calendar, the marketing calendar, the launch calendar during January, and then during February you're maybe recording the episodes, you're learning how to like get a podcast up and out into the world. Maybe during March you're going to be

promoting it and you know, talking about the launch that's coming up and getting people excited about it. And then in April you're going to be executing, right? You're delivering the podcast, you're showing it and you're really just putting it out into the world. So the launch could be promo and execution, kind of depends on where you are. But, um, the execution is the actual deliverable of the thing that you said you were going to do.

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I hope that makes sense. And at the beginning of each quarter or at the end of a previous quarter, I want you to spend time to reflect back on your goals, to see if the plans you had for the quarter ahead actually makes sense for you. So if it does make sense, you can carry it over from the annual plan to the quarterly plan. So at the end of March, at the end of June, at the end of September, and at the end of December I want you to be thinking about how did this quarter goal, how did I make progress on the things that I said I was going to do? Did that actually happen? And then now it's time to break it out into for the next quarter, prep, promo and execute categories.

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Here's some things that will help you decide on some other things. So when there is a quantitative goal, like I want to have 15 people joined my program, sometimes it's not going to be 15 on the nose. So I like to set good, better, best goals. Some people called the bronze, silver, gold goals. And my favorite one is if you beat your best school, you can also have a dancing on the roof naked goal, just kind of funny or a platinum goal. These are goals that are suited to be like metric oriented, and even though you can't control the number, you can control the marketing that you do for it, or you can control the other actions that will lead you to these good, better, best goals. I want you to think also about why this goal is particularly important to you and as you've set a goal, you want to reflect on why you're doing this.

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Why is this a focal anchor point for you in this quarter? How does it either fulfill you or move the needle forward in your business? And I want you also to create a plan for some of your life goals, right? If you're looking at your wheel of life and saying, hmm, why is it so dang low in this particular category? It's probably because you haven't spent a lot of time focusing on improving it and you haven't created a plan.

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And we spend a lot of time thinking about our businesses and our goals and our businesses, but often we don't think about our lives as much. And so create a life goal, whether that's that you want to spend more time becoming healthier or learning about something or learning a new skill. Add that to the focal goals in the life section of the chart that you have in your workbook. So the homework here is to create a plan either for annual or quarterly. It's your choice and also dependent on where you are in when you're going through this exercise. So go create a plan for yourself and I want you to go post it inside the group.