

Welcome!



{Digital Dining Room} 



Planning Retreat :: Session 1

A close-up photograph of a glass plate set on a textured, light-colored surface. A silver fork and knife are placed on the plate, with their handles crossed and secured by a red and white striped ribbon tied in a bow. The knife is positioned diagonally across the plate, and the fork is placed parallel to it. The background is a soft, out-of-focus texture, possibly a tablecloth or placemat.

Your Vision for 2015

Agenda

- Housekeeping
- Where You are Now
- Where You'd Like to Be

Housekeeping

- **G+ Hangouts**
 - How to find/join the next session
 - Settings, hardware
- **Participation**
 - Writing, Listening, Volunteering
 - Sharing
- **Breaks**
- **Expectations & Burning Questions?**

Where are You Now?

- How's your business *already* working?
- What in your life is *already* good?
- What do you want to keep and build on?
- Where are your gaps?



Let's Visualize

Close Your Eyes...



Write it Down



- Where do you work?
- Who are you working with (if anyone)?
- Are you collaborating?
- Are you leading a team?
- What kinds of projects are you working on?
- How many hours a week are you working?
- How much vacation do you take?
- How much money do you make?
- How do you want to feel?

The Questions:

- Billable + Non-billable Hours
- How much growth is healthy?
- What needs to shift?



Next Session...

11:30 a.m., Pacific

2:30 p.m., Eastern

Session 2: Taking Stock

What's in Your Pantry?

Agenda

- What are you working with?
 - Strengths
 - Skills
 - Assets
 - Resources
- What's missing?
 - What you don't know
 - Gaps in Resources

Strengths

- What do you get complimented on?
- What do you do without thinking?
- What kinds of activity excite you?
- When do you feel “in the flow”?

Skills

- Technology
- Organization
- Project Management
- People

Assets

- Content – Virtual & Tangible
- Hardware/Software
- List
- Website
- Testimonials

Resources

- **People**
 - Mastermind
 - Coach/mentor
 - Team members (VA, bookkeeper, lawyer)
 - Supportive Family/friends
 - Clients (current/past)
- **Financial**
 - Bank accounts
 - Credit

Next Session...

1:30 p.m., Pacific

4:30 p.m., Eastern

A collage of various coffee cups and mugs, some containing coffee, some with milk, and some with foam, arranged in a dense cluster. The cups are in different colors and patterns, including yellow with red polka dots, red, white, and blue. The text "Session 3: Setting Goals" is overlaid in the center in a bold, black, sans-serif font.

Session 3: Setting Goals

Agenda

- SMART goals vs BHAGs
- Three Areas
 - Growth/Revenue
 - Prof/Personal Development
 - Operational
- Prioritizing

SMART Goals

- Specific
- Measurable
- Attainable
- Relevant
- Time-bound

The BHAG

- Big, Hairy, Audacious Goal
 - Scares you a bit
 - Is long-term (5 to 10 years or longer)
- The opposite of SMART



Goal 1: Growth/Revenue

What kind of \$\$ do you want
to make next year?

WHY?

[How would you like to get there?]

Goal 2: Development

How do you want to grow
and change next year?

Personally
Professionally

WHY?

Goal 3: Operational

How do you want to improve the operations of your business?

WHY?

Alignment

- What will you work on in your personal life next year?
- What family obligations or concerns do you need to include?

Prioritizing: Top 3

- Ask yourself
 - This or that?
 - Why do I want this?
- Budget Time!
 - What will you invest in this year?
 - What return will you get?

Next Session...

TOMORROW

10:30 a.m., Pacific

1:30 p.m., Eastern

Planning Retreat :: Session 4

A glass plate with a fork and knife tied together with a red and white striped ribbon, resting on a textured surface. The fork and knife are silver and the ribbon is tied in a bow. The background is a light-colored, textured surface, possibly a tablecloth or napkin.

How You Get There

Agenda

- Goal
- Numbers and people
- Details, details

Goal: YOUR Step-by-Step Plan

- Start from the end, work backwards
- What needs to happen BEFORE this can happen?
- And what needs to happen BEFORE that?
- What do you need that you don't already have?

Revenue

- Total Dollars Goal for the Year
 - Per Month
 - Per Week
 - Per Day
- How many clients, sales?
- How many people do you need to get in front of (what's your “close ratio”?)

How Many People x Touches

- What's your “close” rate?
- How many people do you need?
- Rule of 7

Revisit & Review

- April Brunch & Learn: Systems
- May Brunch & Learn: Planning

Next Session...

12:30 p.m., Pacific

3:30 p.m., Eastern

Session 5: Calendar Time!



What Needs to Happen, When?

Agenda

- Blocking Time
- Scheduling for Success

Block Time

- Vacations
- Mental Health Days
- CEO & Manager Time
- Exercise/Lunch
- Writing
- Research
- Social Media/Networking
- Nurture Time

Be Aware of...

- Seasonal shifts
- Conferences and trade shows
- Major campaign seasons

How Often Will You...

- Attend networking events?
- Send emails?
- Blog, podcast, etc.?
- Speak?

Scheduling for Success

- Start with your desired...
 - Launch date
 - Release date
 - Delivery date
- Use the details from Session 4 to choose dates in reverse order
- KEEP IT SIMPLE

Next Session...

2:00 p.m., Pacific

5:00 p.m., Eastern

A collage of various coffee cups and mugs, some containing coffee, some with milk, and some with foam, arranged in a dense cluster. The cups are in different colors and patterns, including yellow with red polka dots, red, white, and blue. The text "Session 6: Next Steps" is overlaid in the center.

Session 6: Next Steps

Agenda :: DISCUSSION!

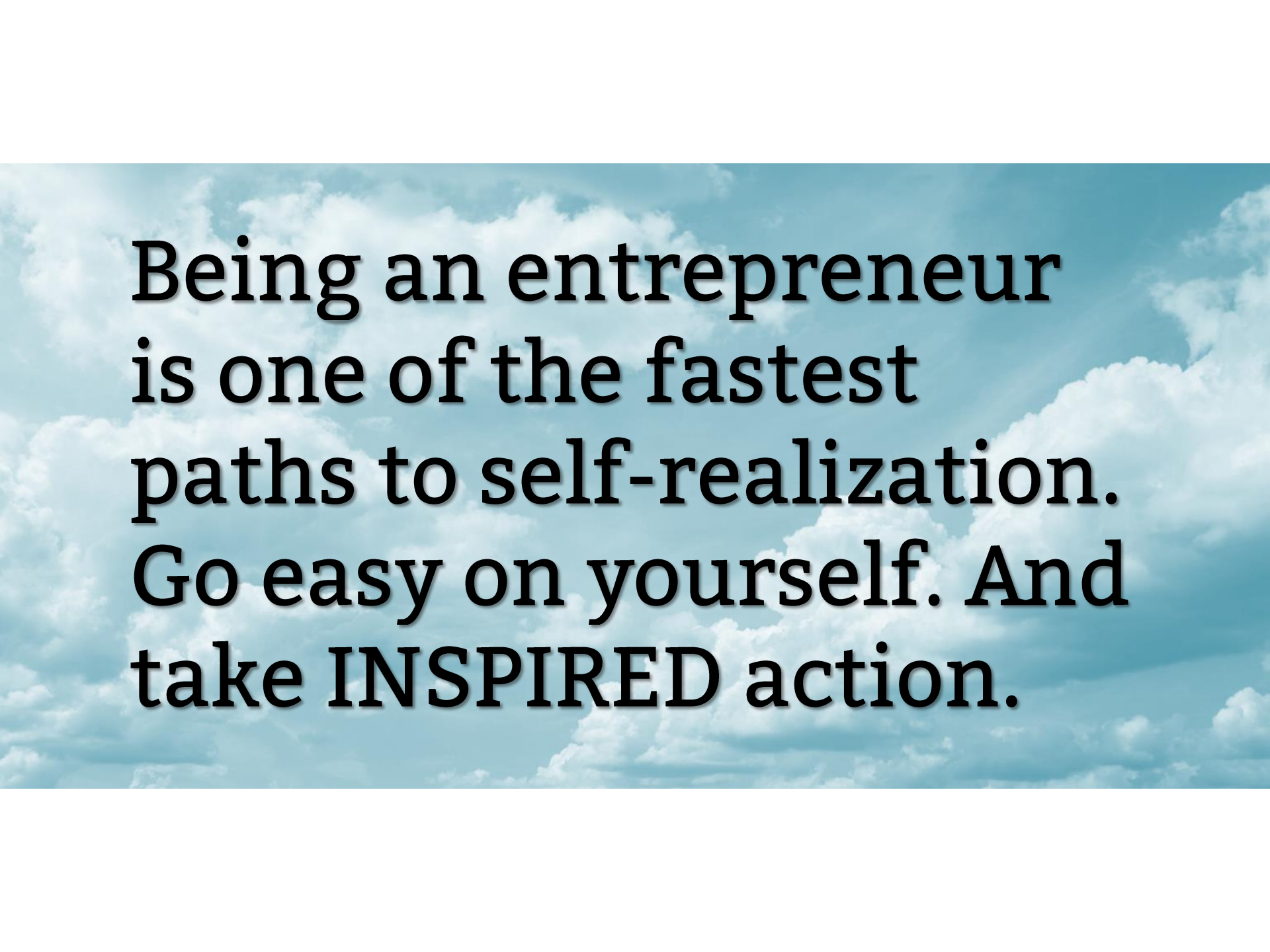
- Physical Gaps
- Mental Gaps

Physical Gaps

- Money
- Time
- People
- Skills
- Technology

Mental Gaps

- Comparisonitis
- Confidence
- Perfectionism
- ...?



**Being an entrepreneur
is one of the fastest
paths to self-realization.
Go easy on yourself. And
take INSPIRED action.**

Wrap Up

- Transcribe your notes into a doc
- Ask for help, ideas, referrals