



# Success Path for the New Year Guided Session

**Review prior to session date – 2-hour prep time**

## **Materials Needed:**

- Two Empty Boxes
- Trash Bag
- Timer
- Worksheets
- Notepad
- Large envelope – Write TAXES 2020
- Gather
  - Business Plan
  - Profit & Loss for this year to date
  - Budget vs actual report or this year's budget
  - List of current clients
  - List of Product & Services you currently offer
  - Business/Personal Goals for this past year
  - Key Performance Indicators (KPI) list, if you have it
- Food & Hydration – Large water bottle, healthy snacks – power bar, nuts, apple, etc. Pre-make your lunch or have something ready to fix. (You will only have a 30 min lunch.)
- Close all apps and programs on your computer

**\* Power Planning - Please complete Steps 1 & 2 prior to showing up on our group call <https://zoom.us/my/results> or ID 585 278 2742 \***

## **Step 1: Prep & Organize**

5 min - Prepare others: Make announcement to staff or household. Turn your phone on DND. Set up "Out of Office" autoresponder on email. Create a sign for door or workspace: DND - Master Planning Session in Progress. (there is a handout for this) Close door.

5 min - Do a Brain dump (handout). Empty your brain so you're ready for the day.

5 min - Meditate or do breathing exercises and make a commitment to stay focused today.

2 Min - Make a sign (or two) with affirmation re: "Why is it so easy to stay focused and create a plan for my business success?" Post where you can see it.

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10 min – Clear off your desk. REALLY CLEAN IT OFF!

- Remove everything except the computer.
- Use the box for items from your desk
- Wipe down desk
- Put back ONLY the items needed for today (clutter free)

15 min – Tidy up your office

- Put away as many things as you can.
- Put items you haven't used or don't use (books, materials, promotional bags, etc.) in box for donation
- Use large envelope for any receipts or items needed for taxes as you're cleaning up.

15 min – Use trash bag

- See how much you can get rid of, so you don't have to put it back on your desk or file it.
- Take to trash bin.

3 min - Schedule more time on your calendar to finish de-cluttering and organizing your office if needed, or schedule regular times monthly.

## **Step 2: De-Clutter your email. It's IMPORTANT!**

50 min – Don't waste your time deleting hundreds of useless emails each week. Be proactive. Review your inbox and get it cleaned up.

- Unsubscribe from senders that no longer give value, or you no longer read.
- Set rules so unimportant and routine emails automatically get filtered into specific folders.
- Mark items for junk/spam folder.
- Delete it, Delegate/forward it, Do It (2 min or less), Defer & file it
- Define Action – Only emails left in inbox should be Action Items
- Can't get it all finished? Schedule time on your calendar to finish up. You will be so glad you did.

5 min – Review the Business Challenges handout. It might give you some insight of where you want to focus for next year.

5 min – Celebrate how much you got done in the last two hours to prepare for tomorrow session.

## **Planning Day via Zoom**

### **9:00 AM – Welcome and set the stage**



## **Report card time – Your Company and yourself**

**9:15 – 10:00**

18 min – Print off Report card (handout)

Rate how you/your company did in the covered areas. (Rate 1- 10)

2 min – Choose one of the above you want to improve between now and the end of the year.

10 min – Brainstorm ideas for improvement.

- Make a list of the resources you need to help in improving that area.
- Who can help?
- What action steps do you need to take?

15 min – This past year goals - review

- Will you accomplish this years' goals by year end?
- If not, document what got in the way?
- What successes have you had this year? (Don't forget to celebrate)
- Missed Opportunities?
- Disappointments?

## **Review: Back to Group for 15 min Review**

**10:00 – 10:15**

## **Yearly or Quarterly Business Plan**

**10:15 – 11:00**

20 min – Review your current business plan. (Quarterly Plan, or SWOT Analysis)

- Does it still apply? Mark items that need updating.
- Make notes on changes needed.
- Schedule time to update. Put this on your task list or in calendar.
- If you **don't** have a business plan, you can:
  - Do Swot Analysis (handout) or
  - Start working on Quarterly Plan (handout)

25 min – Review your Profit and Loss for this year.

- Compare it to your expectations.
- How well did you follow your budget?
- Did you have the income you expected?
- Did you make the profit you desired?
- How much were you able to save?
- Review where you can reduce expenses.
- What needs to change to meet your desired outcome?



**Review: Back to Group for 15 min Review**  
**11:00 – 11:15**

**Visualize & Projections**  
**11:15 – 11:45**

10 min – Visualize what you want your next year to look like.

20 min – Project numbers for next year.

- Revenue?
- Profit?
- Owners Pay?
- Savings?
- Bonus?
- New products or services?
- How Many social media #?
- Staff?
- Tax savings?
- Data Base # growth?
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**Review: Back to Group for 15 min Review**  
**11:45 – 12:00**

**30 LUNCH BREAK** - Set a timer. You're on a roll, don't give up now!  
**12:00 – 12:30**

**Return to Group for afternoon kickoff and Q&A**  
**12:30 – 12:45**

**Public Image**  
**12:45 – 1:45**

5 Min – Update your recordings.

- Rerecord the outdated message on your answering machine or voicemail. Smile while recording and remind callers they can text or email you also.

30 Min – Update social media.

- Review your LinkedIn profile. Is it complete? Does your picture need to change? Is your contact information easy to find?
- Visit your Facebook business page. Is everything updated? Add photos of products and services.
- Visit your profile on twitter or YouTube channel to make sure everything is updated to look fresh and attractive.

25 min - Website

- Refresh or redo?
- Check links
- Make list of changes needed



## **Review: Back to Group for 15 min Review**

**1:45 – 2:00**

### **Marketing**

**2:00 – 3:00**

15 min – List all the ways you marketed this year.

- What worked?
- What didn't seem to work?
- What was the best value?
- Have your Social Media numbers grown?
- Has your database grown?

30 min – Plan your strategy for the coming year – just choose 3-4 and master them.

- Video
- Create a challenge
- Webinars
- Blog
- Guest Blogging
- Writing articles
- Newsletter
- Live Chat
- Master Class
- Traditional marketing
- Facebook, LinkedIn, YouTube - ads

15 min – Write as many topics as you can for the items you chose from above.

- Q & A Topics
- Pains
- Gains
- Products & services
- Which social media platform will you concentrate on?

## **Review: Back to Group for 15 min Review**

**3:00 – 3:15**

### **Implementation & Action**

**3:15 – 3:45**

5 min – Review any steps above that may need more attention or action and place time on your calendar.

25 min – Create an action plan based on your goals and vision for next year.



**Review: Back to Group for 15 min to Celebrate all you accomplished today.**

## Notes




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