



BUSINESS SUCCESS CLARITY WORKBOOK

WELCOME!

I'm so glad you're here!

As a productivity coach and accountant working with business owners for over 30 years, I've learned a lot about what businesses and business owners need to succeed, and I have helped many overcome their challenges and struggles. Seeing a business go from surviving to thriving is one of the greatest joys of doing what I do.

No matter where you are in your journey as a business owner, it's never too late to go back to the basics. Insight and clarity are essential building blocks for creating a solid foundation for that profitable business you've always dreamed of -- one that pays you regularly (and what you deserve for your time and energy), allows you to follow your passion, and brings the financial freedom you envisioned when you started out.

Clarity is a proven strategy for success, and you are about to take a critical first step toward a healthier business.

The journey of discovery that will change your life and business for the better starts now, and I'm so excited for you! I encourage you to be open to the process and let it take you where you need to go. Answers can be found when you have an understanding of what is swirling beneath the surface. I want you to find those answers, so approach this with a spirit of curiosity, commit the time to work your way through it, and let's get started!



How could the Prescription For Success philosophy benefit you and your business? Click to learn more today!

[**LEARN MORE NOW**](#)

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**“WHEN THE VISION IS CLEAR,
THE RESULTS WILL APPEAR.
KEEP YOUR MINDSET
POSITIVE AS YOU WORK
YOUR PLAN,
FLOURISH, AND ALWAYS
REMEMBER WHY YOU
STARTED.”**

~ GERMANY KENT





INTRODUCTION

Building a successful business is the dream for entrepreneurs and business owners. What's the one key to achieving that dream? YOU, the business owner!

We all start out with LOTS of drive and ambition but, along the way, the day-to-day of running a business presents challenges we may not have anticipated. The realities of being a business owner can sometimes be more than we bargained for. Long hours, how to keep cash flowing, the need to juggle it all while making time for other things, and having success or failure rest solely on our shoulders are challenges new business owners don't often take into consideration before jumping in.

The other thing most business owners don't take into consideration before jumping in is how their mindset, habits, and Natural Productivity Style affect their business. Fortunately, every one of us has the potential to improve, learn, and grow in those areas.

Insight and clarity are the foundation for improving, learning, and growing as a business owner! They will help you navigate – or even avoid – the challenges so many business owners face. Whether you're just starting out or have been in business for a while, both will help you set goals, plan, prioritize, streamline your activities and time, and get your business on the path to long-term health and vitality.

Insight and clarity can also lead to powerful, meaningful changes if your business is struggling in some area and you use them to find solutions. That's why taking the time to diagnose or assess is always a good idea.

I encourage you to always have a sense of curiosity about where you are at, whether or not you're focusing on the right things, and how you can improve upon what you're currently doing.

I also encourage you to always be willing to tweak those parts of yourself that might create specific challenges for you as a business owner.

So, take the time now to dig deep, complete the following sections, and start finding the clarity and insight that will IGNITE your productivity, performance, and profits, and strengthen to your ability to succeed!

**IT STARTS WITH
YOUR WHY**





IT STARTS WITH YOUR WHY

Why did you start your business? (This would be the driving force behind why you decided to start a business. Examples might be... independence, following a dream, more control over your time and how much money you can earn, etc.)

Why did you choose the business you chose?

What is your why now?

THE BIG WHATS





THE BIG WHATS

What were your goals starting out? (This could be in terms of income, control of your time, or something else.)

What do you want from your business now?

What are your favorite parts of owning and running a business? In other words, what do you love doing and feel you do well?



What do you dread doing - or not do well?

What is the reality of where your business stands right now? (i.e. not getting paid regularly or at all, the amount you're able to pay yourself doesn't reflect the amount of time and effort you put in, money's coming in but the business is still struggling month to month, you can't keep up with growth, you're overwhelmed, overworked, and exhausted, etc. Be as specific as you can be.)

What is your "style" or approach to time management? For example, do you overbook your day to the point that it's never possible to get it all done? Do you believe in making the most of every minute, or do you often find yourself dismissing to-dos because you don't think 5, 10, or even 30 minutes is enough time to get something done? Do you schedule your time, fly by the seat of your pants, or something in between?



In what ways is your style or approach to time management working or not working for you?

What is *going well* in your business right now?

What parts of your business take up the most of your time?

- **Looking at the list of things that take up the most of your time, which of those tasks are truly helping you grow your business or increasing revenue and what parts feel like a waste of your time?** (Consider each one honestly, then put a star next to the tasks that bring in revenue and are directly contributing to the bottom line.)



What do you think needs to change in your business? In other words, what's NOT working?

What would you like to change? In other words, what's working, but not as well as it could be?

**YOUR
PERSONALITY
STYLE,
STRENGTHS, AND
WEAKNESSES**





PERSONALITY STYLE, STRENGTHS, AND WEAKNESSES

How would you describe your personality style as a business owner? For example, do you fly by the seat of your pants and put out fires as needed? Are you organized or not organized? Are you a planner who tries to anticipate and mitigate problems, or do you tend to avoid and hope problems will go away on their own? Maybe you're something in between. Are you easily distracted? Are you a micromanager? Do you communicate, delegate, and make decisions well? Lots of possible answers here!

Consider each of the examples given and take a moment to reflect and identify your own. Be as specific as possible.

**** Feeling unsure or wanting to take a deeper dive into your personality/productivity style and how it can affect your business? Click [HERE](#) to take the FULL Productivity Assessment and get answers.**

Are you easily distracted, or do you have trouble focusing on what really matters in your business?

What do you think causes the biggest distractions or inability to focus? These could be personality traits or external factors that keep you from being your most productive or performing at your best.



What do you consider your strengths? Describe or list.

Describe or list the tasks or activities in your business that fit well with your strengths.

What do you see as your weaknesses? (Examples might be that you hate bookkeeping or detail work, you're great with vision and big ideas but don't like to plan, you don't like to write or deal with marketing, you have difficulty finishing projects once they're started, you don't communicate well or like to deal with employees, etc.) Describe or list.

Describe or list the tasks and activities in your business that are affected by your weaknesses – the ones you dislike or avoid, either because you don't enjoy doing them, aren't sure how to do them, or think you don't do them well.

CHALLENGES





CHALLENGES

Is there something going on in your personal life right now that's creating challenges in running your business? If yes, what is it?

What specific challenges are you facing within your business? (These should be business challenges, rather than personal/life challenges that might affect your business.)

Do you foresee specific challenges (business or personal) in the future? If yes, what are they?



How do you typically handle challenges when they come up now? (Your answer could reflect both practical strategies and how challenges affect your stress level or ability to be productive.)

If you could change your response to challenges, how would you like to handle challenges when they come up in the future?

MINDSET, BELIEFS, AND ATTITUDES



MINDSET, BELIEFS, AND ATTITUDES

The chart below defines the differences between growth and fixed mindset. Look over the two categories and highlight the descriptions that describe you best.

FIXED MINDSET	GROWTH MINDSET
Believes skills, abilities, and intelligence are fixed and can't be changed	Believes skills and abilities can be learned and they are capable of learning
Avoids challenges	Embraces challenges
Gives up easily	Keeps going when things get difficult
Sees effort to learn, grow, and change as a waste of time - "I am what I am."	Sees effort as a path to mastery
Ignores constructive criticism or negative feedback	Listens to and learns from constructive criticism or negative feedback
Feels threatened by the success of others	Finds inspiration in the success of others
Thinks in terms of scarcity and lack - "glass half empty"	Thinks in terms of abundance and gratitude - "glass half full" or "I'm so grateful I have a glass!"

Looking at the sections you highlighted in the chart above, would you say you have more of a growth or fixed mindset about most things?



What does your self-talk sound like? Are there negative, limiting messages you need to address? Give some examples. (e.g. I'll never be good enough or smart enough to do what I want to do in my life or business, etc.)

- **Is any of it true?**
- **How could you change the negative self-talk to a positive, growth-mindset voice?**

What factors from your childhood fostered a fixed or growth mindset in you or influenced your self-talk today?



Are there abilities or talents you would like to have but don't? What are they?

- **How do you know you don't have them? What is the evidence that you don't?**
- **Do you believe you could develop some or all of these talents or abilities with effort?**
- **Which one you would like to develop most and name one thing you could do to develop that ability or talent?**
- **What else could you do to develop that ability - or others?**



What is your mindset when it comes to the challenges that come in life and business? For example, do you feel defeated when you face challenges, or do you see them as opportunities for improvement and growth? Do you wring your hands and worry or do you look for solutions?

- **Can you think of a time you faced an important opportunity or challenge with a fixed mindset? What was the situation?**

- **Now, go deeper with the description... what were your thoughts and worries about your abilities, other people's judgements, or the possibility of failure?**

- **Can you take that same opportunity or challenge and switch into a growth mindset? How could you use this to learn new things?**



Was there ever a difficult transition in your life where you fell into a fixed mindset and lost confidence in your abilities? Describe the details...

- **Did you label yourself as a loser or failure after this happened?**
- **If you were to face the same situation again, how could you approach that same situation with a growth mindset?**

What is your mindset around change? Do you embrace it, resist, or something in between?



How does your mindset affect your drive to succeed? Is there an area of your life where winning is everything? Please describe.

- **In what ways does your drive to succeed affect your ability to have a healthy work-life balance?**

- **What does "winning" mean to you?**

- **What does "losing" mean to you?**

- **Are you surprised by your answers above? How do your answers make you feel?**

HABITS





HABITS

Are you aware of habits and behaviors that might be either helpful or keeping you stuck? List the habits and routines you have that you are aware of.

Which of those habits and behaviors do you believe help your productivity and performance?

Which of those habits and behaviors might be hurting your productivity and performance?

Which habits and behaviors would you most like to change and how could you begin to make those changes?

FINANCES AND MONEY





FINANCES AND MONEY

How would you describe your financial situation right now? This should be both personal and in terms of your business.

How does your financial situation right now make you feel?

If you are struggling financially, what do you think the reasons are for the struggle?

What are your behaviors, mindset, and attitudes regarding money? For example, are you intentional with decisions about expenses or do you take a more laid-back approach to managing your finances? Is money a tool to use or a driving force behind all you do? In other words, do you control your money or does money control you, etc.?



Where do you think your mindset, behaviors, and attitudes about money came from?

Describe what you believe to be the origins of why you feel the way you do and do what you do when it comes to money.

How are your behaviors, mindset, and attitudes hurting or helping your financial situation?

What would be your ideal financial scenario?

What would be your ideal scenario for managing your money?



What needs to change to make your ideal scenarios reality?

Take a moment to think through and write about anything that might hold you back from making those changes and list them below.

Describe or list some actions you will take to improve your financial situation, based on your responses above.

PART 2: THE ROAD TO A HEALTHIER BUSINESS

Turning Insight Into Action





THE ROAD TO A HEALTHIER BUSINESS

INTRODUCTION

As you look back over your answers in the previous sections, are there things that surprise you?

Building a successful business is complex, and it really is true that you, the business owner, play a huge role in your potential for success.

Everything you identified and clarified in the sections above can affect your potential for a successful outcome. Now that you have a clearer understanding of where you stand, you can take what you learned in the previous section, identify solutions, and turn your insight into action.

Take a few minutes to reflect on the most interesting things you discovered about yourself or your business through your answers and write them below. You can use those insights regarding your whys, your whats, your challenges, strengths, habits and mindsets to start making it all work FOR you. After all, what good is insight if we don't use it to guide our decisions and make meaningful changes?

What were your most surprising revelations from the diagnostic sections in Part 1 of this workbook?



WHY IT'S IMPORTANT TO UNDERSTAND YOUR WHY

Most business experts believe your why for starting your business is the foundation for everything. It's the driving force behind the path you chose and the reason you get out of bed every morning to boldly face the challenges of being a small business owner. It's also the reason you cared enough to look for answers to the challenges you may be experiencing in your business. Keep your "why you do what you do" in mind (or even written out and placed somewhere you'll see it often) and use it as motivation to keep seeking solutions and moving forward.

If your why no longer applies, or you're questioning your reasons for starting or continuing to run a business, it might be helpful to go a little deeper and really clarify why you're doing what you're doing and why/if it's worth continuing. Getting to that place where you are clear on why you're doing what you're doing - and using that as your motivation to do what needs to be done to build a stronger, healthier business - is so key to your potential success as a business owner.

Also, consider your answer to why you chose the business you chose. If you are struggling in some area, there are other questions you should reflect on too.

Are your products or services in demand?

Are you charging enough and making enough money?

Is it possible to make the money you want or need to make doing this, or do you need to make a shift in terms of products, services, or what you're charging?

Is it a business that will allow you to achieve your personal and professional goals?

Does it energize you?

How well does this business you chose fit with your strengths and vision of work-life balance?

All of those questions are important, too. Give them some serious consideration and, once you've clarified the value and purpose of your business, you will be stronger and more energized moving forward. You'll be making a solid decision to commit (or recommit), based on an honest evaluation of the realities of your business, a deeper awareness who you are as a business owner, and a plan for the challenges you might face.



LEVERAGING YOUR WHATS, PERSONALITY STYLE, STRENGTHS AND WEAKNESSES

There always needs to be an understanding of what's working and what's not in your business. An honest evaluation of that includes what you do best and what you might need to turn over to someone else to reduce your stress and increase productivity. You can't fix what you're not aware of, or improve upon what you're doing well, without a conscious, honest evaluation.

At the heart of what's working and what's not is how your personality style, strengths, and weaknesses fit in the bigger picture.

Again, who you are as a business owner has a HUGE impact on how your business runs in the day-to-day. How well you manage your time and focus, as well as figuring out how to make the most of your Natural Productivity Style all affect your results. When it all comes together and aligns, you will get to a place where you can do more of what you love, get focused on the RIGHT things, and really ignite your efforts and potential for success.

As you look back over the Personality Style, Strengths and Weaknesses section in Part 1, it is important to remember that weaknesses are neither good nor bad and don't reflect negatively on who you are as a person. We all have weaknesses, and it's actually a very positive thing if you are able to admit yours. Identifying and acknowledging weaknesses gives you the opportunity to either choose to improve yourself or find someone to fill in the gaps those weaknesses create. When you look at it that way, that's empowering!

So, embrace your weaknesses and celebrate the opportunity your insight around them provides. Then figure out what needs to happen to change their effect on your business.

If you're not sure about your Natural Productivity Style, strengths, and weaknesses, and would like to know more about how those factors are impacting your business, I encourage you to take a professional assessment. Consider taking the FULL assessment that includes a professional analysis of your results, so you can get the full benefit of both understanding your style and how your specific style impacts your business. That insight will be a solid investment in your future!

Take the Assessment



EFFECTIVELY FACING CHALLENGES

We all face challenges in our lives and businesses. Challenges, however, can either be out of our control or caused by choices we make. Think about the challenges you listed in the CHALLENGES section above – both personal and professional. Determine if they fall into the category “out of your control” or may have occurred due to choices you made. The type of challenge you're facing can sometimes determine your strategy for addressing it.

When a challenge is out of your control - like a global pandemic, some other situation that causes an economic down turn, or a serious illness - there might not be much you can do other than adjust your mindset and attitude about the situation. You can choose to learn and grow from difficult times - even if there doesn't seem to be much you can change about the situation itself.

First, look for the opportunities. Could you spend some time sharpening skills or creating strategies for future growth? Second, ask yourself if there is there a system or process you could put in place to be in a stronger position - and better prepared - if/when these types of challenges present themselves again? Face these challenges with a positive growth mindset and you will find you can emerge stronger than before.

When it comes to challenges that come as a result of choices you have made, these too can be great opportunities for learning and growth. Don't be afraid to tackle them head on! Be honest with yourself about where you are and why you got there. Then start brainstorming solutions and put the best solutions into action. That is the best way to start finding your way through to the other side - and on to a stronger future.

When you know the nature of your challenges, and develop a solution-oriented growth mindset around them, you can find solutions and create a plan for managing - or avoiding them - in the future. By doing that, you'll find those challenges lose their power to derail you and your business. In fact, they can become the nudge you need to rise to a higher level.

Also, consider hiring a business coach. We all face challenges in our businesses. Support is so important when it comes to working through those challenges.

Adopt a growth mindset and choose to learn from others who have successfully navigated the course. It's an investment in yourself and your business you will never regret.



HOW MINDSET, BELIEFS, AND ATTITUDES AFFECT YOUR BUSINESS

As you can see from the length of the MINDSET section, mindset matters. Your mindset can either be a roadblock to your success or the driving force behind it.

Some believe all the discussion around the importance of mindset is nothing more than the latest craze, but they couldn't be more wrong. It's proven that those with an attitude of gratitude and a growth mindset face life's challenges in a healthier, more productive way. They also tend to be more successful at setting and achieving their goals.

You might ask why, and the answer is simple. We all have a mindset and attitudes about everything, whether we realize it or not. Your mindset consists of conscious and subconscious beliefs about what you can or can't do. Those beliefs can skew your view - both positively and negatively - and affect every aspect of your life and business.

Mindset also influences how you choose to use your time. It affects how you make and manage your money. It affects your ability to clarify what you want and why. It even impacts your ability to dream big, which prompts you to set goals for the future, along with other things. Basically, if your mindset and beliefs are limiting, your potential will be limited too.

Once you've determined where your self-talk and beliefs come from, the next, most important question is... are you willing to make some changes in this area? Answering "yes" to that question, and taking some positive steps toward shifting your limiting thoughts and beliefs, will open doors of possibility like never before!

So, take the time to review your responses, take what you learned about yourself from that section to heart - without judgement - and define some action steps you can take to increase your awareness when fixed thoughts enter your mind. Learning to turn those around when they pop up will be a game changer in your life and business.

What is the biggest limiting belief or mindset piece that is holding me back, and how can I start to change it?



CREATING HEALTHY HABITS

As you may have guessed from the clarifying questions, habits can be helpful or hurtful to the running of your business, and we're often not even consciously aware we are doing them.

In the HABITS section above, you identified some of your habits that are helping you achieve your goals, and some that may be holding you back. Now is a good time to give yourself a pat on the back for those positive habits! It's also a good time to consider what habits need to change, now that you're aware of them.

Changing habits is not always the easiest thing to do. It requires effort, but it can be done. You've already taken the first step. The next step is to make conscious choices about what you do and how you do it, and start consistently making the changes you need to make.

So, review your responses in this section and start giving some serious thought to what is most important to change.

As you are doing this, I encourage you to keep in mind that changes don't have to be big and overwhelming. You'd be surprised how even small changes sustained over time can bring BIG results!

And again, coaching is a great way to bring lasting changes. Besides offering guidance on how to navigate the changes you need to make, coaching brings accountability. It has been proven it is far easier to follow through on a commitment to make changes when there is someone cheering you on and nudging you when you need it. I'd be happy to discuss how coaching could help in this area. Please feel free to schedule a Complimentary Consultation any time! [Schedule your Free Consultation Now](#)

However you decide to make the habit changes you want to make, just pick a place to start and take action.



HOW MINDSET, BEHAVIORS, AND ATTITUDES AFFECT YOUR FINANCES AND MONEY

Finances and money can be huge stumbling blocks for many. We all realize money isn't everything in life, but it is the lifeblood of our businesses and we need it survive and thrive in our personal lives, too. Unfortunately, few of us get the knowledge we need to create wealth and financial peace in our lives, which is truly a shame.

We may dream of having more and think that would solve all of our problems, but the truth is that no amount of money will ever be enough if we aren't managing what we have with a healthy mindset and intentional, wealth-building behaviors. You may have even realized this as you were completing the section above.

As you explored your mindset, attitudes, and behaviors around money, you most likely uncovered some behaviors or attitudes that don't fit with what your ideal is. Fortunately, that is something you can easily change. You just need to learn what you don't know and start flipping the script on your money story.

To start, take the ideals you identified and really do some soul searching around how important those ideals are to you. Then dig a little deeper and honestly assess your level of willingness to put in the effort to make them reality in your life.

If (or when) you determine you are willing to make the changes you need to make, lay out some action steps and start taking action!

Putting a system in place to assist you with this is a good investment in your financial future. One option is an easy-to-implement system I created called The Miracle Money Method.

The Miracle Money Method system was designed for business owners at all levels of accounting knowledge that can help you turn things around more quickly than you might imagine. I even included a learning module at the end of the program to show you how the business system can be modified to bring positive changes to your personal finances, too. You can learn more [HERE](#).

When you have clarity, a system, and a plan, you can change your financial future for the better, and that is the best investment you could ever make.



USING CLARITY TO MOVE FORWARD AND FUEL YOUR SUCCESS

At this point, you might be wondering where you go from here. You now have a pretty good idea of what needs to change, but how do you follow through and actually make meaningful changes that last?

It really comes down to getting the support you need to succeed. A business coach can help you figure out how all the pieces come together. An accountability partner can encourage you and help you stay on track. Productivity or financial programs will provide solutions for the specific challenges you're facing. So, consider your next step to be finding that right fit of support and encouragement as you go forward.

The Productivity Experts and Prescription for Success helps business owners find comprehensive solutions for them and their business, based on their specific needs. ***If you're wondering if The Productivity Experts might be the resource you need to succeed, you can schedule a complimentary 30-minute call with me to discuss your business challenges and how I can help.***

[Schedule Time With Cathy](#)

Whatever you decide to do, just keep moving forward. Take the clarity you've gained, turn it into action, and put it to work for you. Use your insight to make shifts in how and why you do what you do, and you'll be on the path to a healthier business and a more balanced, productive life.

In the following section - Pulling It All Together and More - you will find a number of template pages. Print out the pages that make sense to you and use them to help you implement and benefit from your new habits, mindset, and goals for your life and your business. You'll also find a page full of additional resources to help you on your journey forward. I invite you to make use of all of these resources to continue your quest for a better, stronger business.

**PULLING IT ALL
TOGETHER:
TEMPLATES AND
MORE**





GOAL PLANNER

DATE: _____

GOAL #1

GOAL #2

GOAL #3

ACTION STEPS

ACTION STEPS

ACTION STEPS

NOTES



Cathy@theproductivityexperts.com | 314-267-3969

www.TheProductivityExperts.com

Cathy Sexton, Productivity Expert

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HABIT CHANGES

DATE: _____

HABIT #1

HABIT #2

HABIT #3

ACTION STEPS

ACTION STEPS

ACTION STEPS

NOTES



Cathy@theproductivityexperts.com | 314-267-3969

www.TheProductivityExperts.com

Cathy Sexton, Productivity Expert

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THE WHAT PROCESS

It is easier to improve than it is to reinvent

What can I do **MORE** of?

What can I do **LESS** of?

What can I **STOP** doing?

What can I **START** doing?



Cathy@theproductivityexperts.com | 314-267-3969

www.TheProductivityExperts.com

Cathy Sexton, Productivity Expert

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GOAL SETTING: OVERCOMING ROADBLOCKS

WHERE YOU
ARE NOW



WHERE YOU
WANT TO BE

GOAL: _____

Where are you now?

Where do you want to be?

What are the roadblocks that might keep you from achieving in this area?

What action steps will you take to overcome those roadblocks, and when will you take those steps?



Cathy@theproductivityexperts.com | 314-267-3969

www.TheProductivityExperts.com

Cathy Sexton, Productivity Expert

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DAILY PLANNER

/ /

TIME	ACTIVITY	TOP TASKS
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	MEALS
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	SELF-CARE
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTES

*"Purpose is the place where your deep gladness meets the world's needs."
~Frederick Buechner*

WEEKLY FOCUS PLANNER

MON		WEEK OF	_____
TUE		TOP TASKS	_____ _____ _____
WED			_____ _____
THU		NOTES	_____ _____ _____ _____
FRI			_____ _____ _____
SAT			_____ _____ _____
SUN			_____ _____ _____

“Productivity is never an accident. It is always the result of a commitment to excellence, intelligent planning, and focused effort.”
~ Paul J. Meyer

TO-DO LIST

/ /

TASKS	PRIORITY	DUE DATE	
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HEALTHY NEW HABIT TRACKER

Use this habit tracker to keep new ways of doing things at the top of your mind, so you can consistently incorporate new habits into your daily routines.

WORK ROUTINE

M	T	W	T	F	S	S
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PERSONAL ROUTINE

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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NOTES



Cathy@theproductivityexperts.com | 314-267-3969

www.TheProductivityExperts.com

Cathy Sexton, Productivity Expert

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