



Annual Reflection & Planning

...so you can start 2021 with a clear vision & plan

2020 REFLECTION

THE QUESTIONS (STAY OPEN-MINDED HERE AND DON'T EDIT YOURSELF):

►What are the top 3 things you've accomplished in 2020 that you once believed weren't possible?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

►What's a belief that's holding you back?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

►What's been draining you?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

►What's been energizing you?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

►What's been confusing you? (<-- the thing you just can't figure out)

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

LET'S TALK ABOUT WINS (WE KNOW YOU'VE GOT THEM!):

▸ FINANCIAL

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

▸ IMPACT

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

▸ AUTHORITY + VISIBILITY

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

▸ LIFESTYLE

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

▸ PRODUCTS + PACKAGES

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

▸ TIME MANAGEMENT

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

▸ TEAM GROWTH

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▸ SKILLS DEVELOPMENT

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

▸ OTHER

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES



2020 BIZ ANALYSIS

YOUR MONEY-MAKERS:

- ▶ List the different revenue streams in your business (ex: Services, Products, Programs, Speaking, Sponsorship):

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- ▶ Which revenue stream generated the most money in 2020?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

- ▶ Which offers made you the MOST money in each revenue stream?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

- ▶ What new offers did you create in 2020?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

- ▶ How frequently did you launch or promote your offers?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

- ▶ Did you increase or lower your offer pricing in 2020?

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YOUR 'HOT-MESS-NESS':

- ▶ What feels really messy in your business?

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- ▶ What systems are missing?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

- ▶ What systems are broken?

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- ▶ What's the bottleneck in your business? What keeps you from getting things done?

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- ▶ What was a straight-up embarrassing #fail moment in business?

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- ▶ What decisions did you put off making?

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- ▶ Which projects have you postponed?

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YOUR HEALTHY HABITS:

- ▶ How do you manage your mindset?

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- How do you manage your physical health?

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- How do you unplug?

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- How do you connect with other copywriters & colleagues?

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- At what time of day are you the most productive?

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- What new habits did you create in 2020?

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LOOKING AHEAD TO 2021

THE QUESTIONS (STAY OPEN-MINDED HERE AND DON'T EDIT YOURSELF):

- What are your top 3 aspirations for the next 3 years?

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- What's been draining you? ---> How can you eliminate, automate, or delegate THIS in 2021?

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- ▶ What's been energizing you? ---> How can you do MORE of this in 2021?

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- ▶ What's a new belief you could benefit from in order to accomplish your goals in 2021? How will you know you're on the path (not feelings... what accomplishments will you have along the way)?

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- ▶ What is your priority to fix first in your business? (because solving this could solve the MOST problems)

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- ▶ How will you recharge & reenergize in 2021?

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- ▶ Who do you need on your Advisory Board in order to achieve your goals? (ex: mentors, coaches, therapists, trainers, tax accountant, financial planner, etc.)

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LET'S BREAK 2021 DOWN!

STEP 01: CREATE THE VISION

- ▶ What's your FINANCIAL vision for 2021? How does that break down quarter by quarter?

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- ▶ What type of IMPACT do you want to have in 2021?



YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

► What type of AUTHORITY + VISIBILITY are you creating in 2021?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

► What's your vision for your LIFESTYLE in 2021?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

► What types of PRODUCTS + PACKAGES do you want to create and offer in 2021?

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► How will you MANAGE YOUR TIME in 2021?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

► How will you GROW YOUR TEAM in 2021?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

► What types of SKILLS will you DEVELOP in 2021?

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STEP 02: SET Q1 GOALS

CHOOSE 3 CATEGORIES (AKA BUCKETS) FROM ABOVE - WHICH 3 WILL YOU FOCUS ON IN Q1? ONLY 3!

1. ADD YOUR BUCKET 01 HERE
2. ADD YOUR BUCKET 02 HERE
3. ADD YOUR BUCKET 03 HERE

WHAT IS ONE SPECIFIC Q1 GOAL FOR EACH BUCKET?

1. BUCKET 01 - ADD YOUR SPECIFIC GOAL HERE
2. BUCKET 02 - ADD YOUR SPECIFIC GOAL HERE
3. BUCKET 03 - ADD YOUR SPECIFIC GOAL HERE

Ex: Lifestyle - I will take all weekends off by the end of Q1

Ex: Team Growth - I will onboard a new VA by the end of Q1

Ex: Authority - I will launch my new podcast by the end of Q1

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STEP 03: SET 3 GOALS PER MONTH

CHOOSE YOUR MONTHLY GOALS *AND MAKE THEM SPECIFIC* BASED ON THE Q1 GOALS YOU'VE IDENTIFIED ABOVE.

► JANUARY 2021

- BUCKET 01 GOAL
- BUCKET 02 GOAL
- BUCKET 03 GOAL

Ex: January 2021: 1) I will spend 1 hour every Monday blocking my calendar so I maximize my time. 2) I will interview 5 potential VAs. 3) I will record 6 podcast episodes.

► FEBRUARY 2021



- BUCKET 01 GOAL
- BUCKET 02 GOAL
- BUCKET 03 GOAL

► MARCH 2021

- BUCKET 01 GOAL
 - BUCKET 02 GOAL
 - BUCKET 03 GOAL
-

BONUS: LET'S TALK MONEY!

2021 FINANCIAL GOALS:

► What was your 2021 revenue? What about expenses? What about profit?

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► How many clients/customers did you serve in 2021?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

► How many offers did you sell in 2021?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

► What is your projected revenue for 2021?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

- ▶ How many offers do you need to sell to hit that revenue goal?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

How frequently will you need to sell those offers (or launch)?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

Does your pricing need to change in order to achieve that financial goal?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

How many customers/clients will you need to purchase per offer to achieve that financial goal?

YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES HERE - YOUR RESPONSE GOES

YOU DID IT!

NEXT STEPS:

- ▶ Find an accountability group or partner to hold yourself accountable.
- ▶ Schedule monthly and weekly goals-check-ins (CEO time). Block it on your calendar now.
- ▶ Share any takeaways from today's session, along with your goals, wins, struggles in the FB group (today and moving forward).