



How to Have Your Best Year Ever!

A Workshop To Help You Achieve
Everything You Want in 2016

Workbook

Presented by

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Planning Your Best Year Ever

As every small business owner knows, if you're not having fun and enjoying your work, it's pretty tough to stay motivated. And if you're not feeling motivated, it's nearly impossible to grow.

So many entrepreneurs — especially those of us who work alone as solopreneurs — simply exist, working hard day after day, without ever loving their business — or having lost that love and enthusiasm they initially had when they first went out on their own — and sometimes even coming to resent the very things they used to enjoy.

Perhaps this sounds like you or perhaps you still look forward to your day-to-day tasks, but are having trouble achieving your goals. Perhaps you don't even know what your goals are.

Perhaps business feels boring or stagnated, and you just can't seem to reach that next level that so many guru's promise you you'll get to if you just buy another program.

Whatever level you're at, whether you're in love with your business today or not, the only sure-fire way to make the next year your best ever is to spend some time reviewing your wins, setting new goals, and planning your strategy for the coming months.

If that sounds overwhelming, don't worry. It's easy, and even fun.

REVIEW & CELEBRATE THE PAST 12 MONTHS

Before you can look forward to the new year, you need to spend some time looking back. And when you're done, I hope you can proclaim, "You've come a long way, baby!" But if not, don't despair. Because if you follow the plan outlined in this workbook, you'll be able to look back at the end of next year and say, "Boy, was it fun reaching all of my goals!"

It may not feel like it right now — especially if going in to your office day after day has become to feel like a bit of drudgery — but you may be very surprised to learn that you have very likely accomplished a lot in the past

12 months, but you'll never know what has come about if you don't take a few minutes to look back and actually find out.

So take a few minutes to think back on this past year to how you started out, and on the pages that follow make a list of how you've grown and improved. Keep the following life and business areas in mind as you make your lists:

- Family / Relationships / Personal
- Financial
- Reputation
- Audience Reach
- Charity & Volunteer Work
- Business Vision
- Spirituality

Think about where you were *then* versus where you are *now* for each of these areas, and any others that are important to you.

HERE'S TO A PRODUCTIVE,
PROFITABLE AND VERY
HAPPY NEW YEAR!



Taking a Look Back

What are your favorite memories of last year?

What did you accomplish or finish?

What made your heart light up last year?

Who nurtured you and gave you support?

Who did you nurture and give support to?

Taking a Look Back

What were your biggest challenges last year?

What were your biggest failures or disappointments (if any) last year?

What did you learn about yourself?

Do you have any unfinished business left to take care of?

Business Policies

Daily Office Hours:

Mon _____ Thur _____

Tues _____ Fri _____

Wed _____ Sat/Sun _____

Hours of Availability (to others):

Mon _____ Thur _____

Tues _____ Fri _____

Wed _____ Sat/Sun _____

Best Times to Reach Me:

Mon _____ Thur _____

Tues _____ Fri _____

Wed _____ Sat/Sun _____

Best Ways to Reach Me:

My Pricing Policy:

My Refund and Returns Policy:

How I want to be treated (by my clients, partnerships, collaborators others):

What I will not tolerate:

My Pricing and Delivery Policy:

Customer Service Guarantee:

Confidentiality Agreement:

Your Action & Success Plan

As a self-employed business owner — and a solopreneur — you wear many hats. What duties and practices can you put into place to be your best in the following areas:

Secretary/Assistant: (How often and for how long will you wear this hat?)

Examples: Process Email, Empty the inbox, clear your desk, organize office, schedule and confirm appointments, write letters and emails

Bookkeeper: (How often and for how long will you wear this hat?)

Examples: Enter and track income and expenses, send and collect invoices, prepare monthly money management reports

Creator: (How often and for how long will you wear this hat?)

Examples: Create products, design service and program offerings, create products, set pricing, establish launch sequence and execute launches

Project Manager: (How often and for how long will you wear this hat?)

Examples: Set deadlines, create time lines and manage timing of launches, keep projects organized and on schedule

Chief Executive Officer (CEO): (How often and for how long will you wear this hat?)

Examples: Establish mission and vision, make plans for growth, oversee the entire business operation including financial decision-making

Your Action & Success Plan

In order to feel abundant, free, confident and secure, what amount of money would you need to earn this year? (Write it BIG so you can see it!)

Total amount
I want to earn: \$

Less Taxes
and Expenses: \$

Take-Home
Pay: \$

How much I need
to earn Monthly: \$

How much I need
to earn Weekly: \$

How much I need
to earn Daily: \$

List 10 or more things below that you can do or create this next year to make those numbers a reality:

1

6

2

7

3

8

4

9

5

10

Assign a dollar value to how much each of these items will earn you.

Assign a date for when you will launch or do each item.

Your Action & Success Plan

How many days will you work each week?

How many focused hours will you commit to working each day?

How many vacation days (or weeks) will you take this year?

What are you doing when you are NOT doing what you are SUPPOSED to be doing?

Before you can answer this question, you may need to do a time study of how you spend your time. For two or more weeks, set a timer for 15 minute, 20 minute, 30 minute or 1-Hour intervals; each time the timer goes off, write down what you were doing in the time before it went off. Be honest with yourself and do not alter your "normal" routine for this exercise.

What are your greatest time wasters?

What do you need to stop doing once and for all?

What are the perks and benefits you enjoy by being your own boss?

GOAL SETTING

Try setting at least one goal in each of the following areas, but do not overburden with yourself with too many. You don't want to become so overwhelmed that you get nothing accomplished.

Family / Relationships / Personal

Financial

Spiritual

Charity & Volunteer Work

Business Growth

Accountability & Support

Aside from the tools and training you'll need to achieve your goals, you'll very likely need support and accountability from others as well.

Who will keep you motivated when you just want to give up?

Who will help increase conversions on your landing pages?

Who will share different ideas and perspectives with you to help increase sales?

As a small business owner, you need a solid support system to help you get the right things done. These support people will include:

- Your spouse or significant other
- Your business partner (if you have one)
- Your mastermind group
- Your accountability partner
- Your business and/or life coach (Marty would love to have this role.)

Of these, whom do you currently have? Whom do you need? What roles will they fill in your goal setting and business growth?

PERSON	ROLE

Goals by Profit Center

If you have more than one profit center, use this page to create a monthly goal for each center.

Month/Year: _____

Profit Center #1: _____

Objective: _____

Projected
Income: \$

Actual
Income: \$

Profit Center #2: _____

Objective: _____

Projected
Income: \$

Actual
Income: \$

Profit Center #3: _____

Objective: _____

Projected
Income: \$

Actual
Income: \$

Profit Center #4: _____

Objective: _____

Projected
Income: \$

Actual
Income: \$

Profit Center #5: _____

Objective: _____

Projected
Income: \$

Actual
Income: \$

Project & Goal Planning

Complete this form at the beginning of every new 30-day period.

Month/Year:

Where do you need to put the most effort this month?

Filling the Pipeline Following-Up Sales Conversations/Presentations/Demos Closing Sales

What is your Big Goal for this month?

How many focused hours will you commit to working each day to attain this goal?

If you could meet this goal, what would that get you?

Examples: Pay some bills? Take a vacation? Buy a treat? Buy something for your kids or spouse? Re-invest in your business?

If you meet this goal, what will be your reward?

Make it something meaningful, not something you would ordinarily treat yourself with.

What are up to 3 things you need to help you accomplish your goal?

Examples: Hire an employee? Hire a contractor? Hire a VA? Take a class? Learn a skill? Brainstorm ideas with someone?

1

2

3

List up to 10 activities/actions you can do daily to achieve this particular goal:

1

6

2

7

3

8

4

9

5

10

Give yourself permission to take **imperfect action** to achieve this goal.

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Day/Date _____

5AM 00..... 15..... 30..... 45.....	11AM 00..... 15..... 30..... 45.....	5PM 00..... 15..... 30..... 45.....	11PM 00..... 15..... 30..... 45.....
6AM 00..... 15..... 30..... 45.....	12NOON 00..... 15..... 30..... 45.....	6PM 00..... 15..... 30..... 45.....	12AM 00..... 15..... 30..... 45.....
7AM 00..... 15..... 30..... 45.....	1PM 00..... 15..... 30..... 45.....	7PM 00..... 15..... 30..... 45.....	1AM 00..... 15..... 30..... 45.....
8AM 00..... 15..... 30..... 45.....	2PM 00..... 15..... 30..... 45.....	8PM 00..... 15..... 30..... 45.....	2AM 00..... 15..... 30..... 45.....
9AM 00..... 15..... 30..... 45.....	3PM 00..... 15..... 30..... 45.....	9PM 00..... 15..... 30..... 45.....	3AM 00..... 15..... 30..... 45.....
10AM 00..... 15..... 30..... 45.....	4PM 00..... 15..... 30..... 45.....	10PM 00..... 15..... 30..... 45.....	4AM 00..... 15..... 30..... 45.....

Here's what I want to remember about today...

A Living Document

The goals and task lists you've created are only the beginning. You'll continue to add to them as new ideas occur, and old ones turn out not to work (or you hate doing them, or they've lost their importance).

So don't look at any of these as a **MUST** do list. Look at them as a **CAN** do list instead.

Here's the really important thing, though:

Do something every day.

Pick one thing that will move you closer toward your goals each and every day, and once in a while — say once per quarter — revisit your goals and your vision and ask yourself, "Is this still what I really want from my business and life?"

Then, make your decisions accordingly.

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