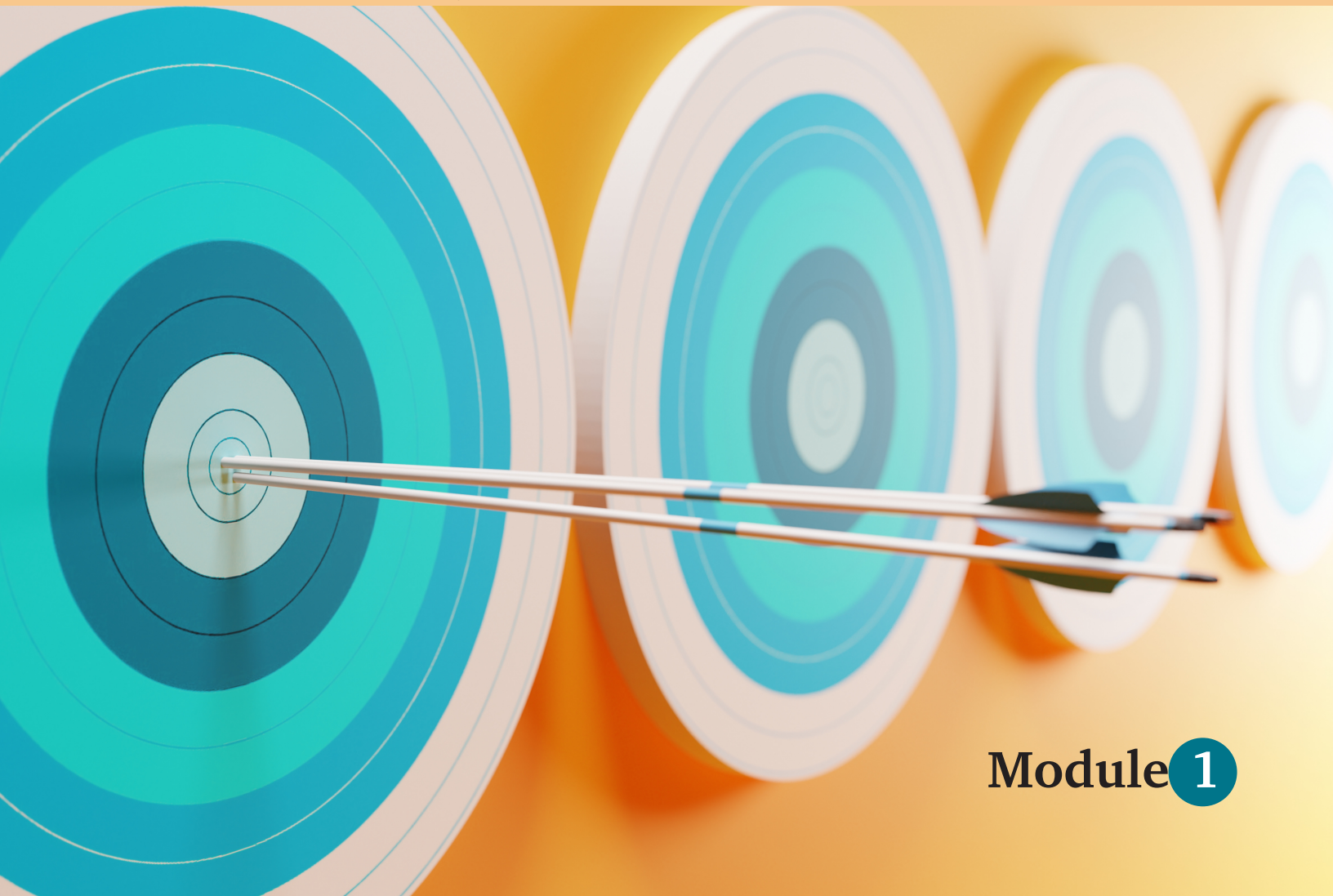


12-MONTH MARKETING PLAN *for Coaches*



Module **1**

Plan Your Programs, Content, and
Promotions for the Entire Year!

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12-MONTH MARKETING PLAN FOR COACHES

Module 1: Work Smart, Not Hard

Learning Objective: Assessing your past year and deciding how to move forward

If you were on a long journey, but didn't know where you were going (or why) you would, in all probability, end up somewhere that didn't feel right, not connecting with the places or people you want in your life.

If you were on a long journey, and actually knew what city you wanted to get to but you focused solely on getting there by taking it one step at a time and heading in the general direction, you would eventually get there, but it might take forever and on that journey, you would have only a vague idea of how far you had actually traveled and how far was left to go.

You might also have a totally erroneous view of your progress, either feeling despair because you think you have thousands of miles to go, when in fact you

are almost there... or thinking you are almost there when in fact, for the last five years you've literally been walking around and around in circles.

Give yourself an accurately updated **map**, however, and all of a sudden, everything comes into focus. You know exactly where you are, how far you've come, what direction you need to keep pointing yourself at—and how many more miles you have to go. You now have an accurate, powerful **frame of reference**.



Better yet, you can glance at your map, and see things you weren't even aware of before: Potential obstacles and shortcuts! You can choose the route that works best for you—the scenic route or the fast-track express route.

You can choose the stops along the way, and calculate accurately how far you need to journey each day in order to get there by your goal date.

The same is true with your business. Unless you know where you want to go and how long you want to take to get there, with a map to help you track your progress and stay on target, you'll run around and around in circles, eternally “stuck”—wondering why you never got to Cleveland and why you're still stuck in Muffin Flats, watching the tumbleweeds roll down the empty main street.

If you've been spinning your business wheels for a long time, you may be starting to feel despair. The good news is, the ‘despair’ stage often occurs when you're **actually within sight of your goal**. What you need is that last, focused push to get you there, over those final few obstacles. And that is what your 12-month marketing plan is going to do, *if you commit to using it*.



STEP ONE: TAKING STOCK OF WHERE YOU ARE IN YOUR BUSINESS

The first step in creating your new 12-month map: Setting that destination!

If you were to envision your perfect life, 12 months from now, what would it look like? Take a moment to sit down and actually write this out.

What would:

- Your perfect home look like?
- Your perfect day look like?
- Your perfect business look like?
- Your perfect client look like?
- Your perfect income look like?

What do you want to be known for? In what way do you feel you can best help your client? Even more important, does envisioning yourself helping in this way energize you or kick you in the gut? Does it fill you with joy or drain you flat? If the answer is the latter, you haven't quite got it yet. You're still stuck in doing what you "ought" to do instead of practicing with passion.

A small tweak might be all you need to this ultimate goal: For example, coaching part-time instead of full-time or offering Zoom sessions instead of one-on-one sessions. Or you may need to change your area of focus. Or you may need to change your coaching focus completely (or even get out of coaching).

All this is doable, but whatever you decide, the goal you're heading towards should excite you, scare you at least a little and above all be something that you want so passionately, you can almost taste it.

Once you've identified that, you're ready to look back in order to finally start moving forward. Ready? First...

Take a Financial Snapshot:

Do you know:

- Your profit last year?
- Your last year's loss?

How much were your expenses? If you have a bookkeeper, ask her for a summary of last year (your easiest, most time-saving method). If you don't have a bookkeeper, dig out your financials and start making a list, including monthly expenses and annual expenses.

How much profit did you make? If you haven't made a profit, that's a good indicator that it's time to step up your business goals.

What are your needs? Factor in not only your basic living and business expenses, but also upcoming irregular financial expenses such as mastermind courses you want to be free to take, or travel to live events; a new wardrobe or vacations.

Dig out your tax return. How much did you make last year? Was it enough? How much more do you need to make in order to live the life you want?

Once you take a look at your year in review—especially your profit and loss—you'll be able to instantly see things that need to be adjusted, as well as where you need to ramp up your money-making activities (or add new ones). If you've been working harder than you should and you aren't reaping abundant monetary rewards, then things need to change. Today!

Ask yourself these two key questions. Don't avoid them!

1. Where did you put most of your money over the last 12 months?
2. Did you spend money wisely?

Let's define "wisely". Did you spend it where you can and will get a return? Did you invest it in yourself and your business? Did you invest it in systems and tools that dramatically made your life easier—and you more productive?

Your 12-month marketing plan should also help you hone in on exactly where and how to spend your time, because you will have:

- A clear financial goal
- A clear business goal
- A clear lifestyle goal

Even more important, you'll have a deadline—one year from the day you implement it!

Remember the Pareto principle (you may know it better as the 80/20 rule): It was formulated by J.M. Juran, after hearing economist Vilfredo Pareto muse that 20% of all Italians enjoy 80% of the country's income. He called this "factor sparsity", stating it as a demonstrated fact that 80% of positive outcomes come from 20% of the causes.

Unfortunately, most people spend their lives practicing the 80% hard work and never attain the knowledge and strategies for the 20% needed to generate the 80% positive result: They get stuck working hard on the 80% less crucial or focused busywork, and reap only 20% of the potential rewards—the Pareto principle ("factor sparsity").

Don't let yourself stay stuck in reaping only 20% of the potential profits from 80% of your work. Reverse the trend. Take an objective look at your past year, start tracking your time and money, and shift those gears.

STEP TWO: CREATE YOUR IDEAL WORKING HOURS

Many times, entrepreneurs feel like they ditched the 9-to-5 grind only to end up working longer hours than ever before. Either that—or they constantly procrastinate, producing very little toward completing to-do lists by the end of the day.

Both effects can usually be traced to not setting specific work hours for oneself.

There are both positives and negatives to working at home and choosing your own hours and these come from the built-in flexibility, which you may see only as a benefit, when you start working from home.

You can take a Tuesday off if you need to be somewhere for a family appointment or a personal appointment, and then you can work a little bit longer on Thursday evening or vice versa.

Maybe you want to take off Friday every single week, and you want to work longer days Monday through Thursday. The trouble is, sometimes before you know it, you are procrastinating and putting things off... or else you are back to working 60 hours a week and wishing you could have gone to the movies with your husband and kids.



Either way, you need to set a schedule and create your own working hours so that you create good habits and make the most of the time you are on the clock. These working hours need to make time for your main money-making skill—for example, coaching clients—but also allow time for administrative work, marketing your business, taking care of your clients, and answering emails, as well as your coaching appointments and any other aspects of your business.

Otherwise, you may find yourself unconsciously losing hours each day as you are

distracted by other peoples' agendas and expectations, not to mention the distractions of living in an online world.

Fortunately, tracking your time is not as hard as going back and tracking your finances! Let's start with a simple exercise:

Taking Your Task Inventory:

1. Take or print out a calendar sheet comprising of 7 days—a full week. For each day, write down everything you do that is work related. Do this for the past week, as well as you can remember.
2. Now print out a second copy, and commit yourself to recording a real-time task inventory over the next 7 days.

Taking Time-Suckers Inventory:

3. [Optional:] Print out a third sheet, and in real-time, simultaneously record every task that was NOT related to your business during your working hours.

MONDAY 5	TUESDAY 6
<ul style="list-style-type: none">- <i>Folded laundry—16 min.</i>- <i>Responded to Facebook pop-up—browsed new posts—25 min.</i>- <i>Watched TV noonday news—30 min</i>- <i>Played Minesweeper—15 minutes</i>- <i>Headache: Aspirin plus icepack—45 min.</i>	<ul style="list-style-type: none">- <i>Answered phone call from doctor's office—discussed test results and alternate options—20 min.</i>- <i>Got distracted while researching by cool recipe site—14 min.</i>- <i>Had to phone web hosting company: 20 min (including hold time)</i>- <i>Got distracted by YouTube video—1 hour.</i>

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When your week is up, review your sheets and add up your totals, comparing the week you remembered with the real-time week. Did you expend more time or less on income generating activities or business tasks than you thought you did, looking at your real-time record? Did you spend more time in non-business-related activities than you realized?

This simple exercise should be a helpful reality checker! But we're not done yet...

4. Go back and, using a brightly-colored, transparent highlighter, highlight every task that directly generated money.

MONDAY 5	TUESDAY 6
<ul style="list-style-type: none">- Client skype session—1hr- Attempted to fix broken link—37 min.- Transcribed webinar for subscribers—3 hrs.	<ul style="list-style-type: none">- Checked out competitor's website—15 min.- Uploaded articles to directory—19 min.- Signed up for .PDF—7 min.

It can be unexpectedly motivating to see exactly how much time one devotes to non-money-making tasks and how little time actually generates income for you. This leaves you with a clear picture of how your weeks typically go. (Print out more sheets and track for a couple more weeks, if you like!)

And, of course, the best way to manage your time is to actually **set regular working hours**, if you haven't done that already.

I know, I know: That's actually what you wanted to escape, but first you should get into a solid, habitual work routine before you even think of bending the rules for yourself. But my bet is that you'll find the efficiency and results of working a solid schedule actually liberating and inspiring—and it will stop any secret feelings of "Imposter Syndrome".

The self worth you automatically acquire from being productive is earned achievement—and all the pep talks from others in the world can't give you that sense of real commitment and accomplishment.

Where the "flexibility" comes in is in deciding on the actual hours per day/week, plus how you break them up. For example, if you're a night owl who doesn't even

begin to feel human until 3pm, schedule client appointments from 3–7pm. If you love being an early morning person but you always find you're foggy-brained by 11am, work from 6–11am, take a 2-hour lunch-nap break and work from 2–6pm. Or perhaps you'd rather cram all your client sessions into 3 10-hour days. Go for it! If that's what energizes you, that's a great option.

Find a day-to-day time-tracking worksheet or app that works for you. If you want a simple way to track your time, you may want to try out the Clockify.me app. It's great for teams but it's also great for individuals. The best part is that it's free forever.

There are lots of time tracking apps and worksheets out there, you'll just need to do a little research. Simply Google: Free Time Trackers. There are many choices to suit any style you like.

Use time-tracking sheets or apps like Clockify.me to find your natural work rhythms.

STEP THREE: DITCH THE BUSY WORK

After you complete your inventory tracking and prioritizing assessments, your next goal should be to ditch the busywork—the stuff that doesn't generate income but needs to be done. Let's break down these tasks and separate them into categories, like this:

- Administrative tasks
- Marketing tasks
- Tech tasks
- Client/customer care
- Finances
- Content creation

Add any other categories you frequently need to take care of: For example, web maintenance, uploading content and products, autoresponder care and feeding, and so forth. Then write down how many hours you usually allot to each.

This leaves you able to glance at a typical week and decide:

- How many hours you want to work
- Which non-money-making tasks or activities you can delegate or outsource
- Which non-money-making tasks or activities can be automated
- Which non-money-making tasks you can simply drop altogether, during work hours

Create a Priority List:

Finally, prioritize these tasks. If you make a separate Priority List, it will at first seem similar to your Task Inventory list except that you will already have decided on which tasks you need to get rid of by:

- Delegating
- Outsourcing
- Automating
- Dropping

In fact, use your Task Inventory list to aid you in creating this one from the tasks that were left for you to take care of personally.

Can you find a Virtual Assistant to help you with any of these tasks (for example, someone to deal with Customer Service or handle your inbox)?

You may also discover, when making your Priority list, that you remember tasks that got missed from your task inventory list. That’s okay: These lists are meant to be flexible! Just add them in the appropriate spots and adjust your list accordingly.

Once you’ve done this, figure out:

1. Which of these remaining tasks are absolutely essential every day, week or month?
2. Which of these remaining tasks could be restructured or reduced? (For example, do you really have to write 5 blog posts a week? Could you cut it back to 2 or 3, perhaps?)

Last, arrange the tasks that remain, numbering them in order of importance. For example:

Task	Category	Action Change	Priority Level	Billable?
Post daily receipts	Bookkeeping	Do daily instead of weekly, at end of day	8	No

So, the example above would mean your daily receipt-posting is the 8th task in your day (perhaps one of the last ones). This isn’t to say everyone should blindly adopt this specific task and priority number. In fact, many people will wish to del-

delegate all bookkeeping to a bookkeeper. But if it works better for you to keep a daily eye on your expenses, that's when you include it as a 'keeper' task.

This sort of organized, linear thinking becomes exciting when you start to see for yourself how many hours a month you can work smarter, not harder.

In fact, you should actually end up working less on busy tasks and either more on the parts you love (like client coaching or membership site running and interaction) or just working less, period, if that's your goal. Even if you're not a linear thinker, this type of tracking is necessary.

If you can work strategically and **increase your income by leveraging experts** who can do the task in a fraction of the time it would have taken you to do them—or who can simply free you up to earn more by doing one-on-one coaching—you can actually increase your income by getting rid of the time sucker tasks... and work less.

You may find yourself not only **dropping tasks** from your daily or monthly routine, but also wanting to get rid of or restructure parts of your business that drain and stress you.

For example, if you find working one-on-one a huge drain, switch to doing client sessions via Zoom. If you find workshops more energizing than single-client interaction, shift your business over to an exclusive VIP membership for a small, select group.

Yes, you may lose a few clients if you change your methods but, then again, you may not. Clients often adapt to changes well if you (a) give them advance warning (b) couch your announcement in positive, confident terms and (c) remind them and repeat your advance notices.

Once you've made your big change, you will be glad you did. You'll find that you have more energy and you may even find you've fallen in love with your business all over again.

STEP FOUR: TAKING INVENTORY OF YOUR TIME AND RESOURCES

You've decided which tasks and parts of your business to keep and which to change. If you find that, in order to reach your one-year goal, you need to generate more income than your proposed changes allow for, consider adding sources of passive income and/or additional types of offerings or services.

Map Your Time: For each hour you work, learn to identify money-making tasks and focus on them. They should be the ones you find most emotionally satisfying and energizing... and sometimes the most frightening. (Just remember, the greater the fear, the bigger the sense of accomplishment when the task is done.)

Do what is easiest: That being said, often your best resources are the things you find so easy, you don't even 'count' them!

For example, if you find public speaking easy, create a "Guest Speaking" section on your website with a media sheet and intake form. Let everyone in your business field know that you do speaking engagements and actively seek out X number of speaking engagements per month.

You can make big money with public speaking. And there are so many resources available. Books, speaking coaches, and even YouTube videos.

Re-use created resources: Which content do you have that you can repurpose? Any programs you can refresh with a new look, update guides, and videos for? Can you add a new format to an existing product (for example, quickly write an eBook from a series of recorded webinars? Or make video versions of blog posts for Vimeo or YouTube?)

Have you created popular client resources that you could sell to those who are not yet your clients?

Creating new offers from new content is all well and good, but if you've already created the resources, put them to work and get double, triple—even quadruple—duty out of them! Don't constantly recreate the wheel!

Learn to repurpose in your business so you can make the most of your time and work your business with minimum time, minimum effort, maximum profit in a 12-month period—your own personal application of the 80-20 rule.

STEP FIVE: FROM CHAOS TO CLARITY

After you've done your time tracking, revisit the hours you work. Decide how many hours do you have to work on your business. And if you're still having problems with flexibility issues, try splitting your work day into two specific segments: A rigid period (example: 8-10am) where you do admin tasks OR client sessions (or whatever else you want or need to do daily) and a "flexible" module of X hours to be spaced wherever you can fit them in, the rest of the day.

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Here's an example:

MY DAY	
AM	<p>8-9 a.m.</p> <ul style="list-style-type: none"><input type="checkbox"/> Check online scheduling software for new/cancelled appointments<input type="checkbox"/> Write and post daily blog post<input type="checkbox"/> Daily Messenger check-in with VA <p>9 a.m. to 1 p.m.</p> <ul style="list-style-type: none"><input type="checkbox"/> Client 1-on-1 sessions
PM	<p>4 hours Flex Time</p> <p>Tasks that must be achieved by the end of the day:</p> <ul style="list-style-type: none"><input type="checkbox"/> Posting daily expense receipts<input type="checkbox"/> Work on book (2000 words!)<input type="checkbox"/> Check and respond to emails<input type="checkbox"/> Check my Facebook group and respond<input type="checkbox"/> Check daily advertising stats

Structuring even your flexible time will help ensure you go from chaos to clarity about what makes money and what's important in your day—and that you get the important stuff done without procrastinating.

Here are ten time-mapping and time-saving tips and tricks to further enhance your clarity:

1. Use a time-tracking sheet daily and think of yourself as “on the clock” for the new daily work hours you have set
2. For the first few weeks, record every moment you are “on the clock”—even if it means writing down trips to the kitchen to make coffee
3. List beside each task whether or not your time spent was billable (i.e. income-generating)

4. Adopt a **solution-oriented mindset** when analyzing your time usage, instead of a blame-and-shame attitude
5. Use your tracking to discover which routine tasks you have gone “blind” to—ones you do mindlessly that you no longer need to be doing
6. Delegate, automate, outsource, re-structure, reduce or drop whatever tasks don't directly make you money or help keep you on top of clarity
7. Prioritize your daily tasks in order of importance
8. Plan to do, no-matter-what, the top three tasks on your priority list first, every day
9. Learn to praise yourself for listing the time suckers and facing them, so you can keep an eye on where you bleed time—and energy—and enjoy the feeling of control this will give you
10. Give yourself something that feels like a real reward every day, when you bust old, time-sucking habits and accomplish the top priorities on your list that day

That takes care of day-to-day clarity—but when you go to create an overview and plan your year, take it quarter by quarter. Look at each quarter. Plan your launch dates, what courses you want to launch, what are the most important aspects of your business? Are you running free challenges, new opt-in offers? Whatever you're putting out there needs to go on a calendar and be organized in a strategic way... including taking into account the best (and worst) times per season or holiday to post or launch content and offers.

Think strategically! If you need to hire and expand your team, this is the time to do it. If you want to up-level, a team will help you get there. Leverage the expertise of others. That is when your business will achieve the most, and strategically planned-for, added and implemented outsourcing will help you maximize your income generation, visibility and reputation.

STEP SIX: SUPPORT AND ACCOUNTABILITY

How many times have you done this on your own? How many times have you failed without support? Do you believe your most profitable year is worth investing in? Then outsource!

Do you need support and accountability to walk you through the planning process? That's a crucial part of running a successful high-level business for almost every entrepreneur.

- **Be accountable to yourself** by using your time tracking and also tracking expenses, ads, and other stats
- **Be accountable to a group** either in a paid membership site or in a closed Facebook group relevant to you
- **Be accountable to an accountability partner** this can be anyone you feel will respect and support your goals: a peer, a fellow Group member, your VA, a launch partner or even a relative or friend, if that relative or friend understands the importance of your business to you
- **Be accountable to a coach** one of the best ways to embrace accountability: Schedule regular coaching sessions for whatever you need to focus on in your business. Set goals each week, meet them... and if you don't meet them, admit it and strategize what you're going to do differently the next week

Make a commitment to being accountable, most of all, to yourself.

You'll be glad you did.

