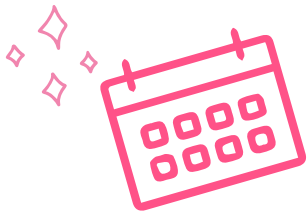




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Success Coach | Author | Speaker | Radio Host

MONTHLY
Goal Setting
AND
POWER PLANNING
WORKBOOK





Monthly REVIEW

DEBRIEF

How have the past 30 days been for you? How've you felt overall?

Handwriting practice area with horizontal lines. A pink pencil icon is positioned at the bottom right, with a dotted line trailing from it.

TOP WINS

What 3 (or more) things have you achieved, big or small?

Handwriting practice area with horizontal lines. Three pink circles are positioned on the left side, serving as bullet points for a list.

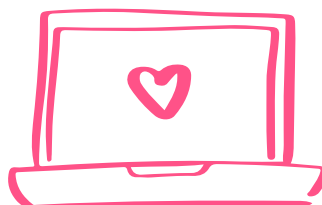
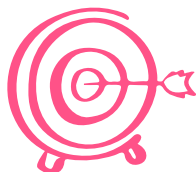


BIGGEST CHALLENGES

What challenges, if any, did you face? Did anything hold you back? Did you hold yourself back and if so, how?

GAMECHANGER(S)

Did you work on one or more GAMECHANGERS this month? If so, what were they?





WHAT'S GOING ON

What's been working well for you, and why?

What's not working for you, and why?

BIGGEST HELP

What's one thing that really helped you in your business this past month? Could be a strategy, a tool, a person, a podcast, a mentor...

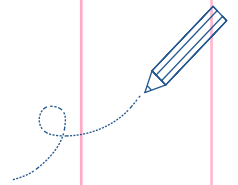


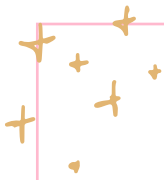


YOUR TIME

What did you spend most of your time working on?

ACTIVITY	WAS IT A GOOD USE OF YOUR TIME?	CIRCLE THE FOLLOWING	NOTES
	☐ YES ☐ NO	KEEP DELEGATE ELIMINATE	
	☐ YES ☐ NO	KEEP DELEGATE ELIMINATE	
	☐ YES ☐ NO	KEEP DELEGATE ELIMINATE	
	☐ YES ☐ NO	KEEP DELEGATE ELIMINATE	
	☐ YES ☐ NO	KEEP DELEGATE ELIMINATE	





Monthly

STATS



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TOTAL **Income**

NEW **Business Builders**

NEW **Customers**



SOCIAL MEDIA **Stats**

NUMBERS

1.

2.

3.

4.

5.





30 Day GOALS



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Use your imagination until your big dream feels so familiar that its manifestation is the next logical step.

ESTHER HICKS

How do you want to feel over the next 30 days?





What can you do to make sure you feel this way?



Write down your

WORD FOR THE MONTH

Get intentional about how you want the next 30 days to be - what would you love to achieve?

What do you want to experience? What do you want to do? Just have fun writing it all down and don't overthink it.





6 CORE AREAS

 VISIBILITY	 LEADS	 NURTURE
What will you do this month to create visibility?	What will you do this month to capture leads/prospects?	What will you do this month to nurture/follow up with your leads?
 SALES	 DELIVERY	 LIFETIME VALUE
What will you do this month to convert leads into customers/business builders?	What do you need to do this month to deliver your products and services? How will you create an amazing experience?	What will you do this month to grow customer lifetime value, upsell customers, get more referrals or repeat business?



Gamechangers

If there is ONE thing I could pinpoint directly as something that has DRAMATICALLY moved my business forward, it would be the idea of a **GAMECHANGER**.

I originally found out about GAMECHANGERS from Angelia Trinidad, the founder of Passion Planner. I started implementing the idea and WOW... not only did I get MORE done in LESS time, but my results in all areas of my life did too.

NOW I GET TO SHARE IT WITH YOU!

A GAMECHANGER is the ONE goal/thing to do/learn that would move the needle the most in your business right now.

Follow these steps:



- 1 Step 1: Pick your Gamechanger
- 2 Step 2: Write down every single step you would need to take to complete your Gamechanger
- 3 Step 3: Add specifics. Assign due dates for each of the the task. Estimate the time needed to complete them. BE SPECIFIC - how much, how many, and by when
- 4 Step 4: Create a timeline. Look over all the tasks and number them in the order that they must get done.
- 5 Step 5: Make a date. Write all of the tasks down into your monthly and/or weekly calendar. Throughout the year, use these as checkpoints to keep you on track.
- 6 Step 6: Work at it. Do at least one thing everyday. Consistency is key.
- 7 Step 7: REPEAT! Once you have completed this Gamechanger... do it again!
- 8 Step 8: EXTRA CREDIT: Sign up for an accountability partner to keep yourself accountable to your goals.



Example Gamechanger Map



What is your GAMECHANGER for the month?

If your gamechanger isn't going to take all month, add another.

1

2





What are the key actions you need to take to make big progress?



*As you start to walk on the
way, the way appears.*



RUMI



Organize your top goals/GAMECHANGERS for the month:

1

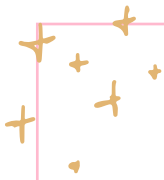
2

3

4

5





Monthly

TARGETS



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TOTAL **Income**

NEW **Business Builders**

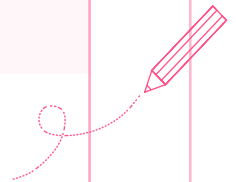
NEW **Customers**



SOCIAL MEDIA **Stats**

NUMBERS

1.		
2.		
3.		
4.		
5.		





KPI Tracking



Inside the **Take Action Academy**, we urge you to track the numbers and actions in your business that matter.

It's a myth that in order to be successful you have to have a huge following or lots of comments on your posts.

We track **leading** indicators, instead of **lagging** indicators.

Leading Indicators

You can only be responsible for the money-making actions YOU take. Income-producing activities are actions like **making offers**, **following up**, and **POW posts**. (If you don't-know what POW posts are, please watch the training in the **Take Action Academy** called, "Using POW Posts to Attract Customers on Social.")

Lagging Indicators

Lagging Indicators are the **RESULTS** of your Leading Indicators. Things like increases in your visibility/following and, of course... **SALES!**

WEEKLY



Offers

Follow Up/Emails

POW Posts



She who makes the most offers... WINS.

KARLA SILVER



GET ORGANIZED

WEEKLY

STRATEGIC Weekly Process (I do this on Sundays)

- 1 Braindump everything onto a piece of paper
- all projects, includine Gamechangers 
- 2 Block out all regular responsibilities on calendar
- everything, kids, doctors, eating, exercise, personal dev..
- 3 Block out all regular business activities - team Zooms,
other calls, social media content creation time, DMO 
- 4 Map out gamechanger - ALL the steps to get it done
and implemented. Allow PLENTY of extra time.
- 5 OPTIONAL: Select a “daily theme” and fill in on calendar



If you fail to plan, you are planning to fail!

~ Benjamin Franklin



Monthly

CEO RITUALS

MONTHLY

BAW Monthly Goal Setting & Power Planning Co-working Workshop



Weekly Personal Strategy Session

Take time to look over the 6 core areas of your business, as mentioned above and work through a solid plan, come up with ideas, make plans.



WEEKLY

Schedule (plan your week)

Set your goals for the week and plan your work (calls, emails, content creation, strategizing, meetings, etc.) For help with this check out the **MAGIC OF HAVING A PLAN** training in the **Take Action Academy**.



Personal Date

Carve out time each week for a Personal Date where you can check in with yourself and your business.



Learn & Grow

Block out a weekly 1-2 hour slot for learning and self-development.



Get Inspired

Block out time each week or even day to tune in with yourself and your vision, visualize your goals and get inspired - this might include reading a book, listening to a podcast, watching videos to inspire you.



Build Relationships

Block out a weekly 1-2 hour slot to network, build relationships and engage with other business owners and potential customers.



DAILY

Set your goals for the day



Go over your schedule for the day



Reflect on your day





**Stay focused on your goals, know that you
can achieve amazing things and go for it!**

We're right here, cheering you on.

*I can and
I will...*

Watch me.



Take Action Academy Programs

Make your Ambitious Dreams a Reality



ACTION ACCELERATOR WORKSHOP SERIES



This is the entire **12 month series** - all workshops at a significant discount - gives you access to my most requested tools

OR

You can register for **one workshop at a time**
Please go to www ldcstrategies.com to register for the individual workshops you desire



TAKE ACTION WITH JET PROPULSION PROGRAM



This **6 month program** builds a strategy and plan; empowers you to embrace your unique gifts, honor your deepest desires, and **step into the fullness of your potential.**

**Download the
COACH ON CALL
APP**



Super Ball Quiz



Scan Me

Take the Super Ball Quiz & schedule a 30 minute **FREE** Session with Coach Lori Anne to Discuss Your Bounce Pattern

