

# HEART SOUL BIZ

## PLAN IT #LIKEACEO WORKBOOK

### HOW DO YOU DEFINE SUCCESS?

Consider all the areas of your life - your day to day lifestyle, your health, your relationships, and your hobbies – everything outside of your business.

### TIME TO DREAM

How do you want to be living your every day life. What would a typical day look like for you? Consider all areas of your life – your day to day lifestyle, health, relationships, hobbies and YOUR BIZ! <3

### BREAK IT DOWN

What needs to happen in order to make this ideal typical day a reality? Think about what changes/shifts you need to make in your lifestyle, relationships, health, self-care, business.

## STOP DOING LIST

What do you need to do LESS OF this year? What is a distraction you need to avoid? What do you need to say NO to this year?

## BRAIN DUMP (5 Minutes)

Spend 5 minutes and write down every goal you think you want to accomplish before the end of the year.

## REVIEW AND GROUP

Review your brain dump and group like with like. What goals are really similar? What goals are actually action steps that would help you reach a goal? Put a star next to the ones that will help you reach a goal.

## CLAIM YOUR GOAL

Now it's time to edit all these goals down to your 1 BIG GOAL. I know it's hard to just pick 1, but we want to focus in and make it happen! List the 1 GOAL you want to achieve by the end of the year.

## TIME TO GO DEEPER

Let's make sure you're really tapped into the goal and start identifying some of the pieces you need to make this a reality. Answer these questions.

Why is this goal important to you?

What will achieving this goal do for your life + business?

What support do you need to achieve this goal?

What training do you need to achieve this goal?

What tools do you need to achieve this goal?

What habits do you need to upgrade to achieve this goal?

What systems or processes do you need to achieve this goal?

## BREAK IT DOWN:

What are 3 specific milestones or goals that will help you to achieve this 1 BIG goal?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## MONTHLY ACTION PLAN

Implement 1 Milestone or Small Goal each month of the quarter towards your 1 BIG goal

1 SMALL GOAL: \_\_\_\_\_

List out all the action items to complete this goal.

\* Put a star next to anything you will delegate.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

# MODEL CALENDAR

## WEEK A

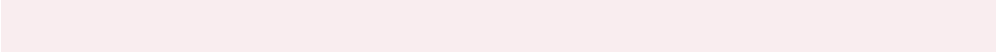
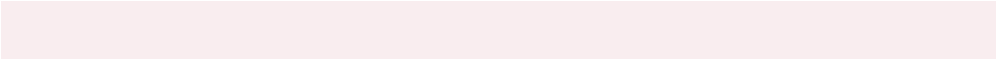
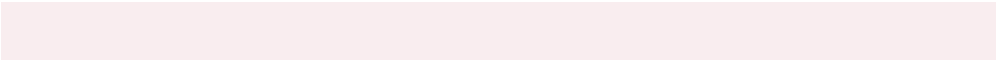
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## WEEK B


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# WEEKLY ACTION PLANNER


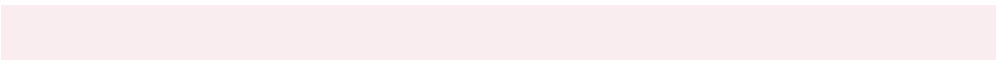
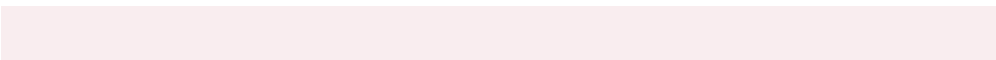
## Week 1: Action Items

1. 
2. 
3. 


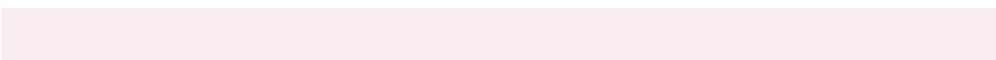
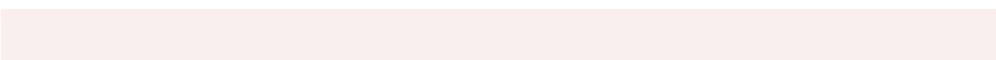
## Week 2: Action Items

1. 
2. 
3. 

## Week 3: Action Items

1. 
2. 
3. 

## Week 4: Action Items

1. 
2. 
3. 

# DELEGATE #LIKEACEO

Deciding what not to do, is as important as deciding what to do. – J. Jackley

Streamlining, systematizing and outsourcing allows you to build momentum and truly focus on higher level work only you can do. It also keeps you from getting bogged down in the details and stuck in the weeds. DIY'ing can cost you a lot more than you realize. Here are just some of the tasks to consider in your business.

| \$45  | \$100  | \$1000   | \$10,000   |
|---|--|--|--|
| <ul style="list-style-type: none"><li>• Managing Inbox</li><li>• Scheduling</li><li>• Social Media Management</li><li>• Invoicing</li><li>• Billing</li><li>• Customer Care</li><li>• Customer Follow-up</li><li>• Website Updates &amp; Posting Blogs</li><li>• Newsletters</li><li>• Create handouts or worksheets</li><li>• Client onboarding</li><li>• Client offboarding</li></ul> | <ul style="list-style-type: none"><li>• Running FB Ads</li><li>• Online Business Management</li><li>• Writing Blog Posts</li><li>• Writing Newsletters</li><li>• Copywriting</li><li>• Graphic Design</li><li>• Editing Podcasts</li><li>• Website Development</li><li>• Software &amp; Tech Integrations</li><li>• Automation Set-up</li><li>• Create Systems and Processes</li><li>• Manage Shopping Cart</li><li>• Video Creation and Editing</li></ul> | <ul style="list-style-type: none"><li>• CEO Dates</li><li>• Strategic Planning</li><li>• Sales Funnel creation</li><li>• Create and Manage Marketing campaigns</li><li>• Sales Conversations</li><li>• Presentations</li><li>• Team Management</li></ul> | <ul style="list-style-type: none"><li>• Teaching a class or workshop</li><li>• Creating a new program or product</li><li>• Creating a new service</li><li>• Speaking</li><li>• Networking</li><li>• Outreach</li></ul> |