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90 Day Biz Plan Plan

Annual Income Goal _____

Quarterly Income Goal _____



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ACCOMPLISHMENTS



Write down everything that went well.

All your successes, achievements, moments of pride - targets, aims or goals accomplished. All your wins, massive, big, small or minuscule - they all count!

Both for your business and your personal life. Make a list or mind map, whichever suits your style.

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I highly recommend you start an ongoing list of Accomplishments/successes/achievements and refer to it often. It will bring you more results more efficiently.

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What did you learn from this? How will you take this new wisdom forward with you?

[illegible]

THREE YEAR BIZ WISH LIST



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Imagine your biz in three years time. How will it look?

How will it operate? What will you offer? Will you have a team?

We're just playing here, this WILL change during the next three years, nobody is going to hold you to it, it's not set in stone. Let your imagination run wild.

[illegible]

ONE YEAR BIZ WISH LIST



Imagine your biz this time next year. How will it look?

How will it operate? What will you offer? Will you have a team?

We're still just playing here, make it a stretch vision, but not TOO far out of your comfort zone.

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90 DAY BIZ WISH LIST



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What do you need to do in the next 90 days to move you towards you one year vision?

90 DAY GOALS



Now let's get clear about what you intend to achieve in different areas of your biz in the next 90 days.

You can use good, better, best goals here if goal setting feels icky. It's important to feel good about your goals.

INCOME GOAL

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MARKETING GOAL

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OFFER GOAL

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SELF/TEAM MANAGEMENT GOAL

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TECH GOAL

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SYSTEMS GOAL

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LEARNING GOAL

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90 DAY PRIORITIES



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Look at your 90 day biz Wish List. What is your top priority?

MY TOP PRIORITY IS.....

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MY SECONDARY PRIORITIES ARE.....

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What do I need to do each month to make this happen?

Remember, none of this is set in stone, we can course correct as we go.

Month 1 –

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Month 2 –

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Month 3 –

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Now the shouty part!



You need to diarise all the actions you can. DO IT NOW!!!

Add any set date happenings to your online and/or paper diaries, then make use of the weekly, monthly and yearly planners found at the end of this workbook.

REMEMBER HOLIDAYS AND BREAKS!

In order for them to help you, to give you clarity, reassurance and anxiety relief.....

You need to update your weekly planner EVERY week.

You need to update your monthly planner EVERY month.

You need to update your quarterly 90 day plan EVERY quarter.

You need to update your yearly planner EVERY year.

It's part of wearing big girls business pants! I'm not normally a shouty person, but this is SO important.

You and your business deserve this. This is your CEO time.

How can you best build this into your weekly, monthly, and quarterly routine?

Diarise your weekly, monthly, quarterly and annual CEO time NOW.

This is a time investment that will pay you and your business dividends, financially, time and health wise.

You have all you need here to craft and plan your business going forward, however, please don't beat yourself up if you don't immediately stick to the commitments you've made to yourself and your business in this plan.

Planning and implementation of that plan is a skill which can be learnt, a habit which can be introduced, and an art which can be honed. You wouldn't show a child or a new employee something once and expect them to do it perfectly from then on in. Be easy on yourself.

I am here for accountability/implementation/brainstorming/course correction/mindset support or just plain old hand holding. If you're not currently enrolled in a support package, get in touch.

Month_____

GOALS

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PRIORITIES

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Week 1	Week 2
	
Week 3	Week 4
	

Month.



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GOALS

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PRIORITIES

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Week 1	Week 2
	
Week 3	Week 4
	

Month_____

GOALS

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PRIORITIES

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Week 1	Week 2
	
Week 3	Week 4
	

Year.....



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JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

Year.....



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JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

Create a Weekly, Quarterly, Monthly, and Annual CEO Task list.



Whether you create;

A checklist in Trello - (video instructions available - <https://bit.ly/Trello-Checklist-Template> ,)

A simple spreadsheet,

A list in your notebook or bullet journal,

Or someplace else. (Just remember where you keep them!)

Having a list of things you do every week, month, quarter, and year helps to keep you on track at times when you've got lots going on in your head, or when you've lost your mojo. It prevents things from falling through the cracks, and helps you to review what is and isn't going on in your business. It can include mindset, celebration and self-care tasks, as well as business tasks.

It's all you need to remember on Monday morning (or whenever you start work.) If you remember to open it, you can work your way through it and your momentum will be going before you know it.

The checklists on the next page give you some examples of some things you could put on your or your teams weekly, monthly or quarterly checklist. They won't all apply to you (if any.) Make the list your own, add the things that are going to help you be consistent in business and life. I like to keep a task list for me, and create separate ones for my team.

Remember to add -

'Check Monthly List' to your weekly list.

CEO Task List Examples



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Weekly

- ♥ Clear down inbox
- ♥ Write down my Accomplishments for the previous week
- ♥ Tidy Desk
- ♥ Brain Dump
- ♥ Filing
- ♥ Weekly CEO meeting (self coaching)
- ♥ Check diary for the week
- ♥ Read/write/spend time with ideal client avatar
- ♥ Read strengths and values
- ♥ Read Whelm wheel
- ♥ Check monthly tasks
- ♥ Check monthly plan
- ♥ Follow ups
- ♥ Lift-Off exercise or equivalent
- ♥ Body work
- ♥ Learning
- ♥ Team meeting

Monthly

- ♥ CEO day
- ♥ Monthly Report for previous month
- ♥ Check quarterly CEO tasks are completed
- ♥ Review 90day plan
- ♥ Write/update upcoming months plan
- ♥ Review weekly reporting
- ♥ What kind of boss/employee have I been this (previous) month?
- ♥ Financial Processes
- ♥ Check Social media profiles
- ♥ Check web copy and links
- ♥ Update testimonials
- ♥ Team meeting

Quarterly

- 🎈 Create new 90-day plan
- 🎈 Create new content plan
- 🎈 Fill content plan with pillars and key dates etc
- 🎈 Financial processes
- 🎈 Withdraw profit (Profit First Implementation.)
- 🎈 Ideal client Love letter
- 🎈 Script ideal day
- 🎈 Check Annual CEO tasks

Annual

- 🎈 Annual review (previous year)
- 🎈 Fill in annual planner
- 🎈 100 reasons why I'm awesome
- 🎈 Review weekly, monthly, Quarterly, Annual, CEO Task Lists
- 🎈 Financial Processes
- 🎈 Review Hosting and subscriptions

Systems Reminder



It's all too common to create a new system in our business, then because we're not in the habit of using yet, we either forget where it is, or that we made it at all.

Record your systems here, and where you keep them, ie the folder/sub folder they're in, documents, google drive, drop box etc and in which program, or the project they're in whether Trello, Asana, or some other digital app, or which notebook, whether paper or digital. If you add new systems here, you'll be much more likely to remember you created it, and you'll have a message to your future self of where you'll find it!

This is Where I Keep My.....

Positive client feedback



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This is Where I Keep My.....

Strengths & Values

Reminding yourself of your strengths and values is a wonderful way to bring your whole self to the table and to attract your perfect fit clients.

List your top strengths and values here, and add to them as they come up for you. Revisit your list regularly. (Put it as a task in your weekly, monthly or quarterly checklist.)

Strengths	Values

Celebrate!



Celebrating our wins helps us to embody our accomplishments and create fond memories to revisit and enjoy. Creating the space to celebrate allows us to bring more pleasure into our lives.

I've included a list of ideas, and options. Do what feels best at any given time and write in your own celebration ideas as you think of them.

It's all too easy to let our wins slip by without acknowledgement. Make it easy for yourself, and enjoy!!!

Celebration Ideas

A cup or glass of your favourite beverage.	Prepare yourself some delicious food,
Order or buy a new beverage (I love creating my own herbal teas so I'll often order a new herb or two to celebrate.)	Watch a film or TV show,
Move your body – stretch, do some yoga, pilates, Qi-gong, Tai-Chi (you can find videos to follow on YouTube if you don't have a regular practice,) or go for a walk, run, or dance.	Meditate,
Play your favourite music.	Pick yourself some flowers.
Sing, chant, read a poem or your vision aloud.	Go and hang out in or at your favourite place,
Arrange or go on a coffee date with someone whose company you enjoy, whether in real life or online.	Go window shopping whether in person or online.
Spend time with your pet, (or a friends if you don't have one.)	Make a vision board.
Massage yourself with beautiful scented oil (or ask someone else to.)	Test drive your dream car.
Take a nap.	Take extra time to do your favourite hobby.
Read a book.	Buy yourself some flowers.
Sit in the garden or go out in nature.	Get your hair and, or nails done.
Paint, draw, knit, do Diamond-Dotz or something else creative.	Test drive your dream car.
Take some time to learn something you've been wanting to, but haven't had time.	Book or take yourself out for lunch or dinner whether alone or with friends or family.

Celebrate cont.

Celebration Ideas (add your in here.)

Book or take yourself out for tea or coffee at your favourite place whether alone or with friends or family.	
Book or take yourself out for tea or coffee at your favourite place whether alone or with friends or family.	
Treat yourself to a new..... (fill in the blank.) It might be something you've wanted for a while, or a random purchase, clothes, books, kitchen items, creative products, make-up, crystals, oils, whatever floats your boat!	
Go to a museum, tourist attraction, try a new activity, be a tourist in your own area.	
Book a massage, facial and or spa day.	
Upgrade your tech whether it's for work or home. (My Thermomix, iMac and iPhone came in this category because I LOVE tech!)	
Upgrade anything in your home that no longer works or feels good when you look at it.	
Increase the hours of your support team whether it's a one-off or permanently. If you don't have a support team, get one, even if it's only one hour a week.	
Hire a new team member, whether for your business or home.	
Join a new programme/hire a coach you've been wanting to work with.	
Book or go on a weekend away or holiday.	
Book a photoshoot.	
Buy yourself a big gift, whether it's been on your radar for a while or it's a total splurge.	

Simple Content Plan



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Week Beginning - Date	Key Selling Dates - launch mode kick off, cart open/close, workshop/event etc	This week I am promoting (All roads are leading to what?) -	This week I'm focusing on - Content pillar/ ideal client trait/	Content idea - Blog/Live title/Freebie
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2				
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Simple Metrics Continued.
What do I make this mean

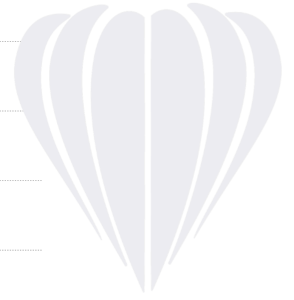
THIS WEEK!.....



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MONDAY - AM

MONDAY - PM



TUESDAY - AM

TUESDAY - PM



WEDNESDAY - AM

WEDNESDAY - PM



THURSDAY - AM

THURSDAY - PM



FRIDAY - AM

FRIDAY - PM



SATURDAY

SUNDAY



Mindset is Everything!

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As a self-confessed planning junkie, it may surprise you to hear me say that **mindset is everything**.

Planning can be life changing, however even with the very best plan, we can't buck our own beliefs. We need to observe the unhelpful ones and gradually transform them into ones which serve us well.

There are hundreds of ways to do this and in order to reach our goals in life and business, it's vital that we find ways that work for us, and use them.

So how do you know when an ingrained belief is holding you back? It's simple really, something happens and you don't feel good. Or nothing happens and you don't feel good.

It would be remiss of me not to give you something to help with this going forward, so I've included my Lift Off process on the next page.

Regular use will help you to shift your ingrained, unhelpful beliefs with relative ease. Feel free to print out the page multiple times and use it whenever you feel less than good in business or in life. (If you'd like a PDF with just the LIFT OFF image let me know and I'll happily send it.)

Other options I've found really helpful are EFT, journaling, meditation, Byron Katie's "The Work," Abraham Hick's "Focus wheel," ho'oponopono, oracle card readings, homeopathy, kinesiology, counselling, & coaching.

If you're not familiar with any of them, google them and see which resonate with you. Give them a go and see what works. Different things work at different times. Be flexible and compassionate with yourself.

A successful business requires a good plan with implementation & course correction of that plan, as well as regular compassionate focus on our mindset, beliefs, emotions and energy.

If you'd like more support with any of this, let's talk.

The Lift Off Uplifter

Belief Transforming Process

You can use this process any time you feel less than good. Regular use will help you to shift the beliefs which no longer serve you.

Knowing what we don't want is a really good way to get clear about what we do want.

We start at the bottom of the page and work our way up and out.

 Write in the cloud what you don't want, write all the things relating to what's going on for you right now. It can include practical stuff and feelings.

How does all that make you feel? (eg, sad, anxious, like a failure, or ashamed)

What would be the opposite feeling? (eg, happy, calm, accomplished, or proud)

 Write that opposite feeling in the small balloon in the middle of the page.

 Now write inside the big balloon what you do want. Use what you've written in the cloud to help. What's the opposite to that? Write as many things as you can, again they can be practical things or feelings/emotions.

Now imagine for a second that you have all that stuff that you want from the bigger balloon, and you're feeling how you've written in the middle balloon.

 All around the outside of the big balloon and cloud, you'll be writing who you need to be, what you need to be & do, and what you need to attract or allow, when all those things that you want are happening in your life, EXCEPT swap the word need for the word get. Refer to what's in your big balloon to give you clues, and add to it as you begin to see how that life will look, and allow yourself to play with the vision of what you'd love to be, do, and have. We're playing with the Law of Attraction here.

So instead of writing I need to be consistent, write I get to be consistent. Or instead of writing I need to be courageous write I get to be courageous etc.

Changing this simple word shifts the focus from an obligation or 'should' which for most of us is uninspiring and feels like hard work, to a much more expansive possibility of who and what we can become.

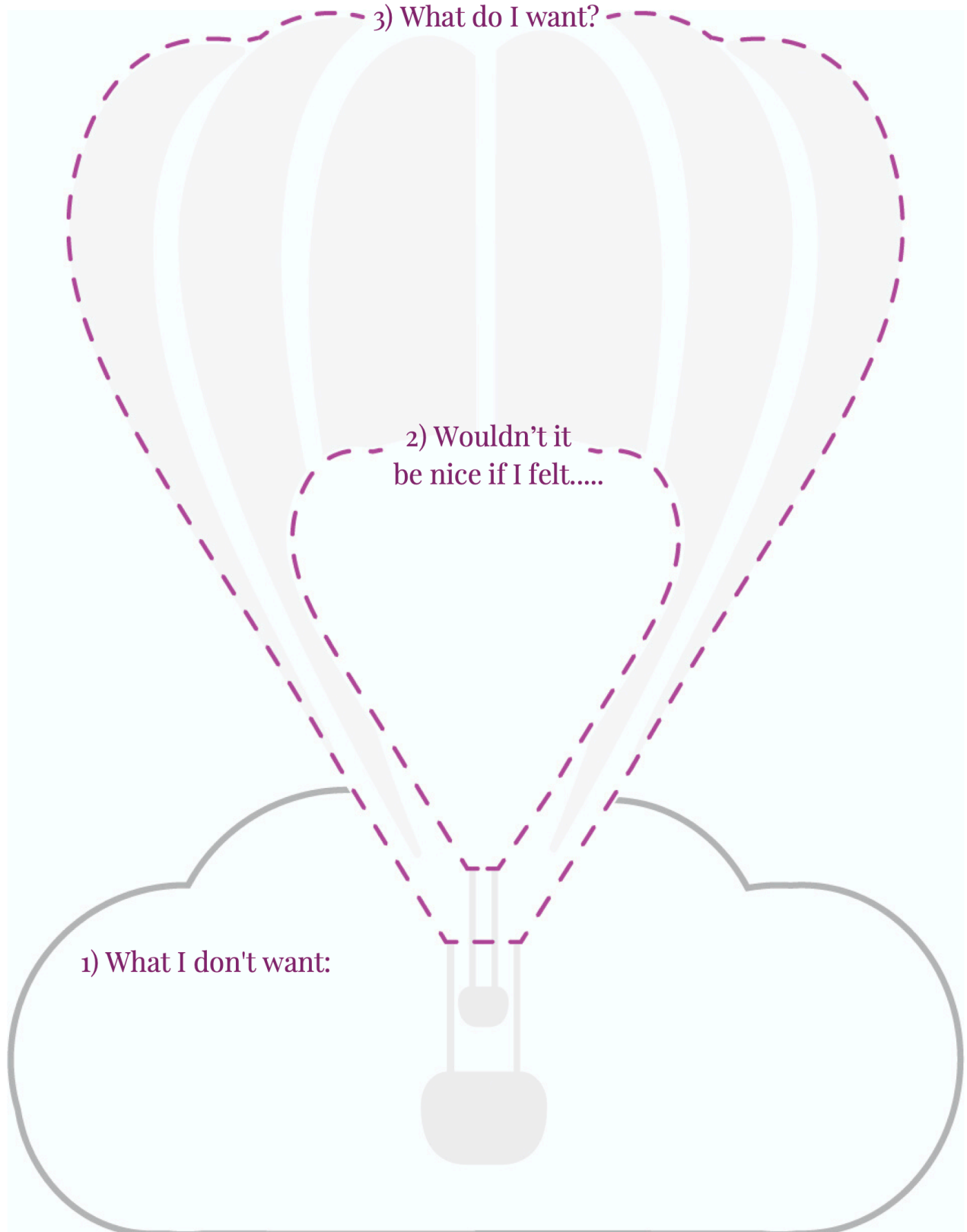
Don't take this too seriously and have fun with it. If you need help, do reach out. With regular use, this process can transform your business and life.

Lift Off



4) When all in the balloon is done.....

Who do I get to be? What do I get to be, do, have, feel, attract and allow?



Week 1 –

Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 2 –

Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 3 –

Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 4 –

Start your working week by WRITING in here.



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Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 5 –

Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 6 –

Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 7 –

Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 8 – Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 9 –

Start your working week by WRITING in here.



Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 10 –

Start your working week by WRITING in here.

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Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Week 11 –

Start your working week by WRITING in here.



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Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.

Accomplishments	Notes/Challenges/Learning	Action Steps for the week
		Spend 5 mins with my plan, long term vision, month to view, and action steps from last week.