

GOAL SETTING BOOTCAMP



BEYOND
THE
MAZE



Lesson 1: Create Your Goal-Setting Plan

Learning Objective: Create a rock-solid foundation for your goals

As with everything, you'll be much more successful in your goal setting if you take the time to put a solid foundation in place first. This involves critical thinking on your part, which includes not only setting goals and preparing to take steps towards reaching these but questioning your own responses to ensure you've dug as deep as you can.

STEP ONE: FINDING AND USING THE RIGHT TOOLS

Spend some time exploring the tools available to see which ones feel the most comfortable for you. Consider both online and offline tools, journaling apps, vision boards, and other creative ways to explore your goals before diving into the next steps.

Before rushing into buying more apps, more courses, or more office supplies, take the time to examine which tools you own, which you use, and which you've abandoned – or don't even remember purchasing. If you take the time to do this, you'll make better tool and resource choices, moving forward.

1. Figure out what works for you

First, identify the number one tool or resource you absolutely couldn't live without in your business. Let's break tools and resources down into categories:

- Brainstorming
- Planning
- Structuring
- Creating
- Organising
- Income generation tools
- Tracking

Brainstorming – How do you brainstorm best? Do you make mind-maps? Jot ideas down in journals or on odd pieces of paper? Do you have your best ideas in the shower or while washing dishes or walking the dog?

Do you brainstorm better on your own, or with at least one other person? Do you get your best ideas in groups? Do you have a group vision board?

How you brainstorm gives you important clues as to the tools you will ultimately find most useful.

Planning – Do you plan meticulously and stick to those plans? Do they move you towards your goals?

Or do you have ‘head knowledge’ – a general idea of what you need to do ultimately, and just work at top speed towards it?

What you need to do is re-assess your planning style:

1. Does it work for you? If not, where does it break down?
2. What steps or areas do you have the most trouble with?
 - Creation
 - I get stuck at specific steps
 - Follow through
 - Other _____

Knowing exactly what’s at the root of repetitive, non-productive behaviors can really help you choose the right methods – and tools.

Structuring – Do you currently have a structure in place for implementing product creation and income generation? Do you have tools and routines that move you from Step A to Step B and so on?

If so, are there leaks and exit points in that structure? Is there always a spot, with every project, where you run out of steam, get confused, get bogged down, or just stall? If so, you need to refine your structure. Identify where you get stuck in repeating processes. Once you’ve done that, ask yourself what you could do to bridge that gap and move forward again.

- Change a tool or SaaS?
- Hire someone to do the problem step for you?

- Find a way to eliminate that step?

Creation – Do you really want to create programs or courses, but find that there’s never enough time do so? If so, it might not be a problem with creativity: It is more likely to be a problem with processes – with your monthly business routine. It might help if you ask yourself, “Where do I get bogged down?”

Write down your answer. There’s nothing like having it on paper – especially if you read your Workbook answers aloud – to wake up your brain and stop it skipping over problems and glitches.

Once you’ve identified where you get bogged down in monthly product creation, ask yourself “Why?”

Then follow the principle of the 5 Whys: A simple, critical-thinking technique invented by Sakichi Toyoda during the formation of the Toyota Motor Company. Don’t stop at your first answer: Keep critically examining each one.

State your problem: _____

Ask: _____

Why? _____

Why? _____

Why? _____

Why? _____

Why? _____

Your answers should help you see the solution more clearly. For example, if all your responses point towards issues such as fear of something, then the solution will lie in mindset readjustment.

If you realise you just hate the creation part, outsourcing or using pre-written PLR content you can tweak might be what you actually need.

Or you might find out, in digging deeper, that you actually hate what you're doing and need to change either the format you're uncomfortable working in or the whole product list altogether.

The point is, questioning and digging deeper will get you past trite or shallow thinking and move closer to the root of the problem.

Organising – If you have problems with organisation, either you're using the wrong tools for you (even if they work for ninety per cent of the rest of the business population), or you haven't yet created repetitive, recurring habits that drive you forward every day.

Take a moment to decide which side of the fence your problems in this area actually lie:

ORGANISATION	HABIT-CREATION
<ul style="list-style-type: none"><input type="checkbox"/> Do you have a daily routine with repetitive tasks or activities?<input type="checkbox"/> Have you ensured these activities are geared toward moving you to reach your goal?<input type="checkbox"/> Have you documented your systems and procedures? Do you ever refine or tweak these? Have you made templates?<input type="checkbox"/> Do you find yourself stuck on certain activities so much that you never progress to the next batch of activities? (For example, do you spend all day on research and never get a word written?)	<p>Identify what business activities you do every single day.</p> <ol style="list-style-type: none">1. Do you do them at the same time or in the same order?2. Do you follow a structure and/or system?3. Do they move you towards your goal?4. Do you use shortcuts like checklists or templates?5. What other habits do you need to add?

Income generation tools – Have you set in place automatic income generation? Do you have an autoresponder to capture signups? Payment buttons and calls to action? Do you tell people to share your offers – and show them how to share it?

Do you have a shopping cart? Is your shopping cart capable of capturing more income – for example, by allowing you to offer a last-minute upgrade on checkout? Does it have cart abandonment technology – for example, automatically sending an “I notice you have items sitting in your cart” email to people who abort the sales completion process?

Have you diversified your income generation methods, or are you a one-trick pony? Do you rely strictly on 1:1 coaching, or have you added passive income like your own signature book? Courses? Monetised webinar replays or seminar recordings?

Have you added recurring income, such as a membership group? Do you plan recurring live events?

Tracking tools – Do you use the insights from various systems you use – social media, shopping carts, autoresponders, or schedulers – to track customer/client behavior? Sales? Leads? Areas of heavy traffic? Leaks or exit points?

If not, that could be a major cause of obstruction to achieving goals right there – and poor or no tracking will certainly slow you down and sabotage your results.

Now, much of what we’ve just talked about are straightforward business systems and, at first glance, have little to do with creativity in goal setting. However, you won’t get results from creative thinking alone, just as you won’t get powerful, unique products from plodding through product creation and copying everyone else. The two go hand in hand: Creativity/Creation and Planning/Organisation.

Taking the time to examine all these questions and answer them – especially if you apply the 5 Whys principle to each one – will help you get past that lost feeling. It will help you sail past the “I had a great flash of insight listening to this Livestream, but now it’s gone” point and help you actually identify your gaps, weak points and problems – while giving you concrete clues on what to do about it.

Not because I told you to, but because this is what works for you. You figured it all out yourself.

That's when you'll get things done!

Can you identify what you want for your business and life right now? If you can fill in the blanks in the following statement, awesome! You won't need much help to move forward. If not, don't worry. The Workbook will help you set these out in more detail.

In 12 months, I would like _____, _____, and
_____ in my business.

I'll know when I've successfully accomplished that when
_____, _____, and
_____ have been put in place/released.”

You can apply this formula to everything to do with your business:

- Habits
- Team-building
- Resources
- Income and/or pricing
- Clients

Here's an example of how you can apply this type of template-thinking using "Team Building" as the goal.

In 12 months, I would like to add a VA, a tech specialist, and a social media manager to my business.

My VA will help free up my time to generate \$_____ (or XX%) more income. In _____ months I should be ready to hire a tech specialist to clean up my systems, synch them all and set up a better shopping cart that captures more sales.

In _____ months I should be ready to hire a social media manager to add social media app tactics, monitoring, strategizing and tracking to my business. She can create quizzes, contests – all the things that [give me nervous breakdowns/paralyse me/I just simply don't have time to do.]

Moral: If a process works for you, make a template out of it! (You can even create templates for your journaling. This could be as simple as writing three repeating headings per page in your journal if it's a blank one – "Morning", "Afternoon", "Evening", etc. or "Idea", "Inspiration", "Affirmation".

Morning	
Afternoon	
Evening	

STEP TWO: DETERMINE YOUR LEARNING STYLE

Digging deeper in the areas we've talked about can also help you determine your **learning style**. When you look over your answers, you may find you begin to notice a pattern – for example, you might note that everything you do visually, with a minimum of work, seems easier or works seamlessly. That would be a reliable indicator that you are a visual learner and need to adjust all processes you have to be involved in to accommodate that preference.

For example, instead of struggling to write course modules, do video modules, with diagrams. Instead of struggling to brainstorm by writing things down in lists, use mind-mapping software. Instead of struggling to keep a detailed written journal – something that feels like a chore to you – add to a vision board instead. Use a bulletin board and pin up pictures or print out affirmations and quotes, and pin these up too.

The ideal business should take full advantage of your own favorite learning and communication preferences – really, to say just 'learning style' is to underestimate the power of the way you think and process. It also applies to the way you create.

Looking back at your answers should help you determine if your style is:

- **Visual** – You think in pictures; prefer videos, diagrams and movies; consider color a vital organisation strategy
- **Informational** – You are a whizz at reading and following written instructions; would prefer to read a transcript or article rather than listen to an audio file or watch a video
- **Audial** – You love listening to audio books or speakers. You retain things best if you make notes while listening.

- **Tactile** – You find you have to learn by doing. No amount of instructions or videos in the world teaches you as much as if you actually perform a process yourself. And you'd rather build or assemble something than read about it.
- **Linear** – You follow instructions religiously, step by step. You hate having to improvise and would much rather have someone else tell what action to take next.
- **Abstract** – You're a person who doesn't have the patience to follow instructions or if you're capable of leaping mentally from step A to step M.

Most people are a combination of more than one style, or they find they favor a particular style in specific areas. If you complete the workbook and its exercises and don't skip steps, (hard for abstract thinkers, I know) you will start to see your own patterns emerge. You'll realise you're not defective in some way, that other entrepreneurs don't really know more than you: It's just that you haven't been aware of your own preferences, styles, habits (or lack thereof). Not knowing why something isn't working for you when it works for everyone else – that leads to frustration and (on some level) to despair.

Utilising your own preferences, style, skills, and areas of creativity will help you plan like you mean it – and know you'll stick to the plan.

We'll finish off with some points to ponder, to help you make the right choices.

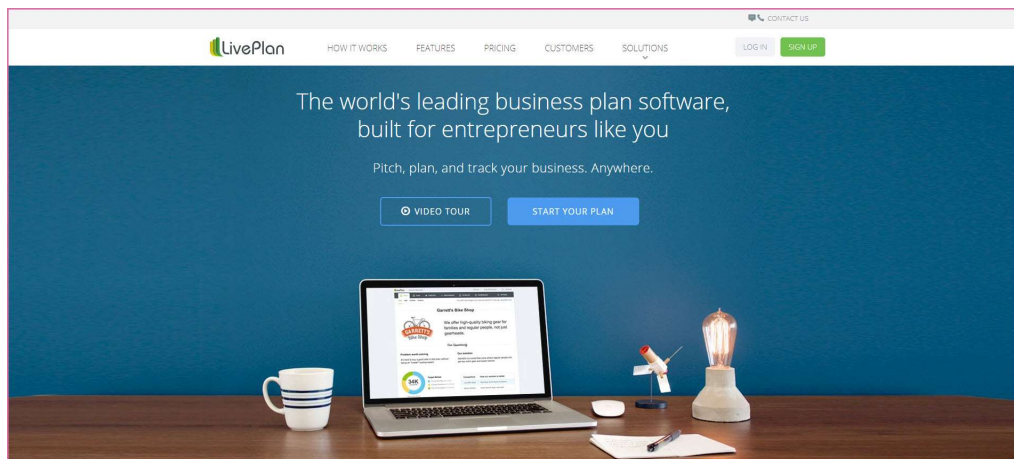
1. Which tools do you use in your business?
2. Which tools do work and which ones are still a source of frustration?
3. Which tools synch with other tools? Do you know? If not, do you need to hire someone to clean up your apps, SaaS, and software?
4. Is each of these tools the best one to help you reach your main goal?
5. What can you let go of – by delegating, outsourcing or just plain discarding?
6. What can be automated – and are you the person to do it or do you need to hire someone?
7. Are the goals I made ones that make me happy thinking about them or are they driven by duty, necessity, or other people?
8. What in my life do I want more of – and what would I love to let go?

We'll finish off with an overview of tools for every learning style – resources you might find helpful in not just brainstorming but also planning your dream goal ... and setting it up for success.

- **Brainstorming:** Journals, mind-mapping software, group interaction, templates

Pay attention to: Learning style (Visual journal? Tactile pen and paper journal, etc.?)

- **Planning:** When it comes to business planning, do yourself a huge favor and – no matter what your learning style – invest in an inexpensive subscription to [LivePlan](https://www.liveplan.com/), where you will find business planning wizards and templates for just about every type of business planning you'll ever do. Plus, you can archive your plans for a fraction of the cost per month, and just reanimate your full subscription whenever you want to revisit them. (Say, annually? Bi-annually?)



<https://www.liveplan.com/>

And LivePlan has plans that suit every learning style too – as well as a vast library of other invaluable resources.

- **Structuring** – Document all procedures you repeat more than once – or have your VA do this. Have her make simple checklists and templates for every repetitive task ... including a template for structuring offers from idea to completion.
- **Creating** – Make sure you build creation time into your schedule. You won't get really good ideas if you're burnt out all the time, struggling through days that never seem to finish. Outsourcing, automating and enlisting the aid of a strong

team – starting with a VA – should give you the time to build in creativity.

This includes planning for breaks away from your business location or home office; mini-vacations; vacations; days off; self-care routines like yoga or having a spa day and socialisation.

(You need these to recharge your brain and soul!)

- **Organising** – If you've taken action on the four preceding points, you'll already have started creating better organization.
- **Income generation tools** – Here's where your VA or tech specialist can help. Make sure your money-handling and product-creation tools are set up to make it easy for you.
- **Tracking** – take advantage of the native insights and analytics of all the apps, platforms and SaaS you use. If tracking is not your thing, have your VA do it and give you regular reports and recommendations

Creating your goal-setting plan requires taking care of all these areas, but if you do so methodically, working through the workbook and making a real commitment to cultivating strong new habits, you can look forward to seeing movement towards real goals.