

Reinvention

A Business Plan for an Awesome Year... 2008



"The purpose of life is to live it, to taste experience to the utmost, to reach out eagerly and without fear for newer and richer experience." - Eleanor Roosevelt

Bring Your Passion & Dreams To Life!

This workbook is comprehensive and completing it will impact your whole life, not just your business numbers. Use it to create a life you love: a life that energizes you because it is aligned with your passion and dreams. Trust yourself and the process. By reducing distractions, you'll have more energy. By focusing where your passion lies, you'll increase your power to work your plan with enthusiasm and attract the business you want. You may find if you encounter some resistance, persevere and know that the resistance is probably just the place where growth is ready to happen.

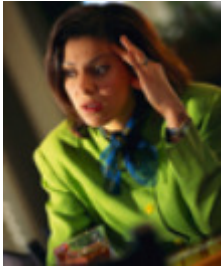
You'll need to schedule some quiet time to thoughtfully review the year to date or your last 12 months. Then you'll be ready to create the next 12 months. Using a coach to guide you through this process will accelerate the results. It is usually powerful to have another perspective and structure for support and accountability. Sharing this, when completed, with the important people in your life is also a way to increase your odds of bringing it to fruition.

*How do **you** want to live next 12 months?* It will take your *intention* and then your *attention*. The written word born from introspection brings powerful clarity. You then begin to instinctively act to produce the best results. **You CAN create miracles, shift the direction the universe was going, by taking action.** Are you ready?

"Time is limited, so I'd better wake up every morning fresh and know that I have just one chance to live this particular day right, and to string my days together into a life of action and purpose." - Lance Armstrong

Congratulations For Being A Player In The Game!

With Hugs & Smiles... ..Joeann



Reflect & Judge

To arrive at your destination, you must know your starting point. Then you can fully leave the past behind you! In reviewing the past 12 months, you look at what worked, what didn't work and what's so. Your awareness gives you the choice to change or continue on the present path. The introspection gives you the ability to make good choices for the future. Then you can go forward with a clean slate.

“Obstacles are necessary for success because in selling, as in all careers of importance, victory comes only after many struggles and countless defeats. Yet each struggle, each defeat, sharpens your skills and strengths, your courage and your endurance, your ability and your confidence and thus each obstacle is a comrade-in-arms forcing you to become better... or quit. Each rebuff is an opportunity to move forward; turn away from them, avoid them, and you throw away your future.” - Og Mandino

1. What were your 3 biggest accomplishments in the last 12 months? _____

How can you leverage these next year? _____

2. What other accomplishments are you proud of? _____

3. What were your biggest disappointments or mistakes? _____

How can these be avoided next year? _____

What changes will you make in your systems to avoid a repeat? _____

4. Did you learn anything from transactions that failed that may save a transaction next year?

5. What new knowledge or skills did you gain? _____

Where will this help you most next year? _____

6. What changes have impacted your market in the last 12 months? _____

What further changes do you anticipate? What new or changed strategies will be needed?

Change _____ Strategy _____

Change _____ Strategy _____

Change _____ Strategy _____

FURTHER REFLECTION (The More Personal Stuff)

7. How and where do you limit yourself? _____

What one belief limits you the most? _____

How can you stop this or reframe it? _____

8. What new friends, relationships and hobbies did you add? _____

9. How are you using the concept of team internally? _____

Externally? _____

Where do you need to delegate or get help? _____

10. Who needs to be thanked or acknowledged for the support they give/gave you?

Make this list as long as it needs to be, using another sheet of paper, if necessary.

Who: _____ What: _____ By When/Done _____ / _____

Who: _____ What: _____ By When/Done _____ / _____

Who: _____ What: _____ By When/Done _____ / _____

11. Who do you have undelivered communications that need to be made so you aren't holding any grudges or past garbage? *Make this list as long as it needs to be, using another sheet of paper, if necessary.*

Who: _____ What: _____ By When/Done _____ / _____

Who: _____ What: _____ By When/Done _____ / _____

Who: _____ What: _____ By When/Done _____ / _____

12. What burdens or toxic people have you let go of this year? _____

Who or what do you need to let go of for next year? _____

13. What was the best marketing tool you used this year? _____

What is your biggest marketing challenge? _____

14. What do you have in your business and life right now that you are grateful for? _____

You ARE UNIQUE Personal Power Inventory *

What is **your** unique combination of strengths? These are *your* keys to success. No one else has exactly what you have. Think of your positive strengths. And also, any “bad habits” that might reap a positive reward. Ask others what they see as your strengths.

“To capture your rapture, identify your powers, store them in your heart, and then act in good faith.” - Marcia Reynolds

ASSIGNMENT: Keep a log for a week of positive accomplishments and productive interactions.

Knowledge Power: Education, life experiences, attentiveness, open-mindedness, intuition, willingness to learn, willingness to forgive, willingness to not be right and to admit mistakes, risk-taking, creativity, broad perspective, observation skills, reading, listening, experiencing the present.

My strengths in this area are:

1. _____
2. _____
3. _____
4. _____
5. _____

Relationship Power: Active listening, communication skills, empathy, compassion, interest, desire to give, ability to receive, appreciation of differences, unconditional respect, responsibility, ability to show love, care for personal appearance, pleasing facial expressions, positive energy.

My strengths in this area are:

1. _____
2. _____
3. _____
4. _____
5. _____

Inner Power: Courage, conviction, commitment, calm under pressure, love of life, love of others, love of self, sense of humor, playfulness, flexibility, decisiveness, determination, commitment to truth, vulnerability, graciousness, sensitivity, generosity, loyalty, honesty, curiosity, faith, awareness, enthusiasm, appreciation, peacefulness, patience, joy.

My strengths in this area are:

1. _____
2. _____
3. _____
4. _____
5. _____

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Down To Business

Pull together all your numbers and information for the past 12 months and establish where you are right now. For maximum leverage in the future, knowing what worked and didn't work this year is important.

“The first quality for a commander-in-chief is a cool head to receive a correct impression of things. He should not allow himself to be confused either by good or bad news.” - Napoleon

THE NUMBERS

Yearly Gross Income:	\$ _____
Business Expenses:	\$ _____
Net Income:	\$ _____
Number Listings Taken:	_____
Total Listings Sold:	_____
Avg Price:	\$ _____
Number of Buyer Sales:	_____
Average Sales Price:	\$ _____
Listing / Sales Ratio:	_____
Number of Closed Units:	_____

THE TIME

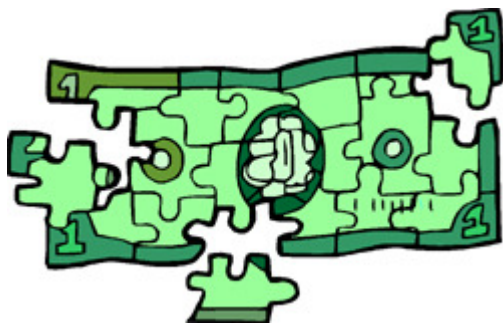
Hours Worked Weekly	_____
Worth Per Hour	\$ _____
Average Weekly Hours Worked	_____
Average Days Per Week	_____
# of Vacation Days Taken	_____
Hours Weekly Biz Building	_____

THE PEOPLE

Number of People in Your Client Base	_____
Number of Networking Groups Involved With	_____
Number of Referrals From:	Sphere of Influence:
	\$\$ Spent _____ \$\$ Rec'd _____
Number of Referrals From:	Other:
	\$\$ Spent _____ \$\$ Rec'd _____

THE MARKETING

Total Marketing Expenditures : \$			
ITEM	\$ SPENT	# & \$ BUSINESS GENERATED	
Newspaper		#	\$
Magazines		#	\$
Direct Mail		#	\$
Internet		#	\$
800 Response Lines		#	\$
Billboards		#	\$
Sphere of Influence		#	\$
Other:		#	\$
Other:		#	\$



The Big Picture

Once you know where you are now, the next 12 months will be

AWESOME !!!

“Everything’s in the mind. That’s where it all starts. Knowing what you want is the first step toward getting it.” - Mae West

Current Net Worth

Assets Today or as of

Cash	\$ _____
Bank Balances	\$ _____
IRA's/Retirement	\$ _____
Vehicles	\$ _____
Home	\$ _____
Furnishings	\$ _____
Jewelry/Art	\$ _____
Equipment	\$ _____

Liabilities Today or as of

Current Bills	\$ _____
Mortgages	\$ _____
Credit Cards	\$ _____
Car Loans	\$ _____
Personal Debts	\$ _____
Business Equip	\$ _____

Total ASSETS \$ _____

TOTAL LIABILITIES \$ _____

CURRENT NET WORTH

\$ _____

Current Financial Reserves

Monthly Overhead
Cash Reserve (not tax reserve)
Months of reserve

Business

\$ _____
\$ _____

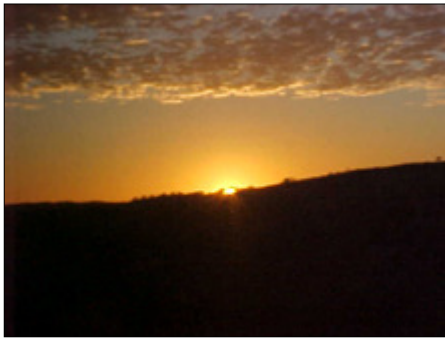
Personal

\$ _____
\$ _____

What do you need to do to take it to the next level:

1. Do you use Quick Books or another accounting system/software to categorize your income and expenses so you can see where you are any time?
2. Do you need to upgrade your software/accountant?
3. What patterns do you see in income/expense numbers that can help you to be more effective/profitable next year?
4. Should you be incorporated?
5. Are you contributing regularly to a retirement program? A solo 401K?
6. Have you determined what the magic number is for you to be financially independent?
___Yes ___No What is it? \$ _____

Great Work! Now you know where you are right now and you're ready to create an AWESOME next 12 months!



Creating An Awesome Year ... Step One

Goals & Values

"Don't ask yourself what the world needs; ask yourself what makes you come alive. And then go and do that. Because what the world needs is people who have come alive." - Harold Whitman

If, twelve months from now, you looked back and felt you had experienced a perfect year, what would you have attained, and accomplished? You have the power to create HUGE accomplishments this year, but you can not do *everything*. Have a goal big enough to expand you as a person and your paradigms. Your goals should never be a measure of right or wrong, but, rather, a direction to aim. Give up small, linear goals this year and create for yourself an exciting challenge; a goal bigger than you know how to do! Create something you can be PASSIONATE about!

By setting specific goals, you focus and move toward what you envision. What you focus on expands! Goals that are not attained are usually ones we haven't fully chosen for ourselves but, perhaps ones we think we SHOULD do. Those kind of goals take lots of energy, self-discipline and aren't much fun. This year, determine the ones that will excite you and pull you into action. Here are the steps:

1. Identify your 5 or 6 most important values. (A TruValues Program that is on the following pages will guide you through a process to discover these)
2. Distill your purpose or vision for your business into one sentence. ***The Passion Test: The Effortless Path to Discovering Your Destiny*** by Janet Bray Attwood and Chris Attwood is a great book to help with this. (If you struggle with this, use another sheet and brainstorm a lot of words or phrases that fit and then come back to this after you work through some of the other areas)
3. Make a TO DO / BE / Have list of everything you want in your lifetime. Yes, everything!!! Make it expansive and complete. Don't edit at all: you'll do that later.
4. Go through the list and cross off the ones that you feel you SHOULD have on there but that don't *really excite you or feel connected* with your authentic self.
5. With the goals remaining, ask yourself: "Would attaining that goal REALLY make a difference in your life &/or in the lives of those around you? Narrow it down to **3 MAJOR GOALS** for the next 12 months.
6. Now ask yourself: "Am I willing to do what it takes to attain this goal? Or, is it a pipedream? Is it something that is in harmony with my natural style and values? Save the goals that feel good to you and resonate with what is REALLY IMPORTANT to you.
7. **Remember:** *When goals are out of line with our values, it's like a black hole. It never seems like you have accomplished enough. Connecting to your passion gives you the WHY of your goals and keeps you motivated when the going gets tough.*
"When you follow your bliss doors will open where you would not have thought there would be doors; and where there wouldn't be a door for anyone else." -- Joseph Campbell

PROGRESS CHART

Date Points (+/-) Score

TRU VALUES PROGRAM 100-POINT CHECKLIST

#	A	B	C	D	Action
25					Party
24					Assist Another
23					Align Goal/Value
22					Make Changes
21					How Upgrade
20					Celebrate Big
19					Phase 7
18					Phase 6
17					Phase 5
16					Phase 4
15					Phase 3
14					Phase 2
13					Phase 1
12					Detail Project
11					Create Project
10					Change 3
9					Change 2
8					Change 1
7					List 3 Changes
6					List Dishonor
5					List Honoring
4					Who Am I, Not
3					Who Am I, When
2					Why Important

GIVE YOURSELF CREDIT AS YOU GET POINTS FROM THE 100-POINT PROGRAM. FILL IN COLUMNS FROM THE BOTTOM UP.

Tru Values Program™

VERSION 4, 9/01

YOUR VALUES are the behavior and activities to which you are naturally drawn.

Values are who you really are. This includes things like:

- Creating
- Contributing
- Adventure
- Beauty
- Teaching
- Spirituality

The complete list of over 150 values follows. The **Tru Values**™ Program helps you to understand values, discern your top 4 values and puts you on a path to honoring them.

This 3-phase, 25-step process can take up to 2 years to complete - not because it is difficult - rather, because you have to handle other aspects of life in order to be able to distinguish the subtlety of values and then re-orient your life around them. This takes time.

To honor your values is to give yourself the ultimate gift.

It is recommended that you work

through the **Clean Sweep** and **NeedLess** Programs prior to or concurrently with the **Tru Values** Program. Your values are not as clear

when clouded by Unresolved Matters and unmet needs. It is also recommend that you work with a Professional Coach trained in Values work. You can do this on your own, but you will complete this program more quickly and more fully with a trained coach who has completed the process him/herself.

Developed by the staff, trainers and participants of

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PURPOSE OF PROGRAM The purpose of the Tru Values Program is to help you to:

1. Identify what **your** true values really are
2. Create and complete a Values Expression Project
3. Reorient your life around expressing these values.

WHAT ARE TRU VALUES?

Values are things you do or that you find very attractive. When engaged in these activities, you feel most like yourself: Well, connected, excited, glowing and effortless. We like these things, but most of us lead lives, which do not grant us the chance to JUST do these things. We may be too busy with "responsibilities", Unresolved Matters, chasing unmet needs, just getting by, etc. In order to honor your Tru Values, you will have to substantially alter and enhance your life to get the room you need to engage in this ideal life.

Many of us spend our lives trying (consciously or not) to honor these Tru Values. We find ourselves getting disturbed or frustrated, bored or complacent, wishing and hoping to have a better life -- this better life is, among other things, based on your Tru Values. Will you give yourself the best gift ever?

Embark on this program and don't stop until you reach 100 points. Your Professional Coach can assist you to more fully understand the dynamic of values and the steps to have them expressed and honored.

INSTRUCTIONS

Please read these instructions **twice**. We have condensed what was a 5-page instruction sheet into a single page, so read carefully and let the subtleties show themselves.

STEP 1: SELECT 10 VALUES

Read the list of 150+ values and circle approximately 10 which resonate as a value for you. You are looking for a VALUE, not a want, a should, a fantasy or a wish. A value is a MUST for you to BE YOURSELF. Part of the first step is to TELL THE TRUTH about what you ACTUALLY VALUE or LOVE to do with your time. This may be the first time you have ever admitted this to yourself. Some of these you will know innately. Others require some straight looking. PLEASE be willing to "try on" words you might normally skip over. These may be hidden values; if so, you may have one or more of the following reactions:

- *No, no, no; that would be too much fun!*
- *That's a silly value; I should have a better one.*
- *If that were true, I'd have to change my life a lot!*
- *Flush, blush or shake when reading the word*

Got the idea? Good. Now circle the 10 words, which you believe to be Tru Values. Ask yourself: "If I had this, would I be naturally turned on, without effort?" (work yes, struggle no)

STEP 2: NARROW YOUR VALUES TO 4

We all value a little of everything listed on this page. But we want you to pick the 4 Tru Values from the ones you circled. You may wish to compare each of your 10 with each other and ask yourself "Now, do I really prefer X or Y? Which ones aren't that intriguing to me anymore? Which ones, when honored, make the other ones not as exciting?"

Please choose your 4 Tru Values and write them on the front panel where indicated.

ADVENTURE

Risk The Unknown Thrill
Danger Speculation Dare
Gamble Endeavor Quest
Experiment Exhilaration Venture

BEAUTY

Grace Refinement Elegance
Attractiveness Loveliness Radiance
Magnificence Gloriousness Taste

TO CATALYZE

Impact Move forward Touch
Turn on Free others Coach
Spark Encourage Influence
Stimulate Energize Alter

TO CONTRIBUTE

Serve Improve Augment
Assist Endow Strengthen
Facilitate Minister to Grant
Provide Foster Assist

TO CREATE

Design Invent Synthesize
Imagination Ingenuity Originality
Conceive Plan Build
Perfect Assemble Inspire

TO DISCOVER

Learn Detect Perceive
Locate Realize Uncover
Discern Distinguish Observe

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TO FEEL

Emote To experience Sense
To glow To feel good Be with
Energy flow In touch with Sensation

TO LEAD

Guide Inspire Influence
Cause Arouse Enlist
Reign Govern Rule
Persuade Encourage Model

MASTERY

Expert Rule field Adept
Dominate field Superiority Primacy
Preeminence Greatest Best
Outdo Set standards Excellence

PLEASURE

Have fun Be hedonistic Sex
Sensual Bliss Be amused
Be entertained Play games Sports

TO RELATE

Be connected Part of community Family
To unite To nurture Be linked
Be bonded Be integrated Be with

BE SENSITIVE

Tenderness Touch Perceive
Be present Empathize Support
Show compassion Respond See

BE SPIRITUAL

Be aware Be accepting Be awake
Relate w/God Devoting Holy
Honoring Be passionate Religious

TO TEACH

Educate Instruct Enlighten
Inform Prepare Edify
Prime Uplift Explain

TO WIN

Prevail Accomplish Attain
Score Acquire Win over
Triumph Predominate Attract

Step 3: CREATE A LIFE WHICH HONORS & EXPRESSES YOUR VALUES

Now that you have your Tru Values identified, you will want to create a way to have them all expressed, forever. This process has 3 parts as described below.

HONOR YOUR VALUES

When you honor your values, you honor your Self or Higher Self. Values are those activities you naturally engage in when your life is in great shape. Until this time, you may be expressing (like doing) your values, but they are not being honored. To honor your values means to create and live your life in such a way that there is nothing in the way of you living your values. This means a life of integrity, free of addictions or attachments, all needs met, clearing unresolved past experiences, a full and supportive community - like an ideal life.

Some people engage in this values process as a way to get a great life: "I want to honor and express my values, so I am changing x, y and z!" they exclaim. Hey, whatever reason you use to put your values FIRST is great. Look for examples of the kind of changes I am talking about on the last page

of this program handout under Step 7. Choose 3 of these changes to begin fully honoring your values.

EXPRESS YOUR TRU VALUES THROUGH A PROJECT

Now that you've cleared the decks and upgraded your life so your values can play, it is time to come up with a fun project which gives your values a showcase - a way to get stimulated and used; a way to show yourself that living your values is both possible and fulfilling. (Fulfillment is the experience of life one has when values are honored and expressed.) This project shouldn't have any shoulds about it. Don't pick one that will drive you crazy, one that you are not ready for (but "should be"), one that you think you should want, but really don't. Rather, design a project that lets you play big or play well, effortlessly. Examples are in Step 11 on the last page of this handout. Design a project that brings out your best, naturally. Don't do a project in order to "get something" out of it. Do it because you enjoy it.

ALIGN YOUR GOALS WITH YOUR VALUES

After finishing your values expression project, you are ready for the final phase - aligning your life goals with your values. In other words, being at the place in life where you can afford to set only those goals, which honor or express your values. This assumes you're close to 100 on Clean Sweep and NeedLess programs. But wow, what a place to be at in life! The alignment steps are:

1. Make a list of your 10 goals for this year.
2. Make a list of your top 10 values.
3. Match the goals with the values.

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NOTE: The objective here is to only have value-based goals this year. If you have a goal that does not "fit" with one of your top 10 values, either adapt the goal to fit the value or GET RID OF IT and come up with another. Don't adapt the value to the goal. And only have one goal per value. **You are using your values as the reference point in your life - not your goals.** And that is what makes this process so exciting!

TRU VALUES PROGRAM CHECKLIST

Use this checklist to guide yourself through the program. Fill in the circle when you have started on the step. Fill in the square when you have completed the step. Fill in the appropriate box on the Progress Chart on the first page when you have completed the step. Work these 25 steps in order.

Do this process for **each** of the 4 values you've chosen as Tru Values.

- 1. Select the Tru Value, using the procedure described in Phase 1. Write in the value at the top of the chart on the first page of this program.
- 2. Ask yourself "Why is this value important enough to me to be a Tru Value?" Write down 5 specific reasons on a sheet of paper.
- 3. Ask "Who am I when I am this value? How do I act? What do I think about? What motivates me?" Write down 5 specific examples on a piece of paper
- 4. Ask "Who am I not when I am this value? How do I behave? How do I feel about myself? About others? About life?" Write down 5 specific responses on a piece of paper.
- 5. Ask "How well am I honoring or expressing this value? What am I doing in my life that permits this value to be free enough to express itself?" Write down 5 specific ways that you are currently honoring your values.
- 6. Ask "Where am I not honoring or expressing this value? What I am doing that restricts, dishonors or does not give my values the room and nourishment they need and deserve?" Write down 5 specific things you are doing which don't serve your values.
- 7. Ask "What 3 changes would I make in my life in order to fully honor and express this value?" Write down the 3 specific (and probably large) changes to make in the next 90 days. Examples of changes: • change jobs • face & handle something tough • stop smoking • start full communicating • let go of duties • get special training • let go of the future • let go of draining people
- 8. Make change #1 - permanently.

- 9. Make change #2 - permanently.
- 10. Make change #3 - permanently.
- 11. Ask "What is the project/goal that I could design which would be a full expression of this value?" Come up with the project. Examples of projects:
 - Run the NY marathon • Make \$1,000,000 this year • Write a book • Go parasailing in the Alps • Throw a huge party • Make yourself stunning • Help 1,000 people out • Invent a product/process • Master a subject/field • Climb Mt. Rainier • Develop a community • Be hedonistic • Get on a spiritual path • Win the lottery
- 12. Outline and milestone the project into 7 Phases. Give each phase an assessable result or milestone with a deadline.
- 13. Begin the project; complete Phase 1.
- 14. Complete Phase 2.
- 15. Complete Phase 3.
- 16. Complete Phase 4.
- 17. Complete Phase 5.
- 18. Complete Phase 6.
- 19. Complete Phase 7. Tie up loose ends.
- 20. Celebrate significantly for completing your Tru Values Expression Project. You'll know what to do.
- 21. Ask "How must I now upgrade in my life to have this value fully honored and expressed throughout it?" Come up with 5 substantial changes.
- 22. Make these changes.
- 23. Align your top 10 goals for this year with your top 10 values per procedures discussed in Phase 3.
- 24. Share this process with a friend and help them get started with it.
- 25. Throw a party to celebrate your new life.

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BE / DO / HAVE LIST FOR MY LIFETIME

"Consult not your fears but your hopes and your dreams. Think not about your frustrations, but about your unfulfilled potential. Concern yourself not with what you tried and failed, but with what it is still possible for you to do." - Pope John XXIII

Let go & be creative! This is for your eyes only. Use all the paper you need and dream big! What have you given up on being able to have? Or what did you used to love doing that you haven't done lately? Include all areas of your life. Family, spiritual, financial, career, business, social, physical, learning, personal development, environments, pleasures, recreation, adventure ... everything that is most important to you.

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| 72. _____ | 94. _____ |
| 73. _____ | 95. _____ |
| 74. _____ | 96. _____ |
| 75. _____ | 97. _____ |
| 76. _____ | 98. _____ |
| 77. _____ | 99. _____ |
| 78. _____ | 100. _____ |

My 3 Major Goals For The Next 12 Months

Joeann’s Rule Of THREE:

Choose 3 things to focus on. You’ll increase your power and effectiveness. This also enables you to bring your power, magic and brilliance to bear. As you attain each goal, it enhances your life, increases your happiness and makes a lasting difference. Take a few minutes, close your eyes and picture how you will feel when each goal is accomplished. The hard part is often letting go of some goals for later.

MY THREE MOST IMPORTANT AREAS OF FOCUS AND MEASURE OF SUCCESS ARE:

1. _____
2. _____
3. _____

“By choosing just 3 goals, you won’t dissipate your energy all over the place, but bring power to these three areas.” - Joeann Fossland



Creating An Awesome Year... Step Two

Creating The Plan

(Insuring Your Accomplishment)

"Yesterday's answer has nothing to do with today's problem." - Bill Gates

Your vision is the beginning. Make it exciting. **Thomas Edison said, "There are no rules here - we're trying to accomplish something!"**

Planning the implementation is the next important step. Without a plan, your goals can get sidetracked or, even worse, they can become another incomplete part of your life that you feel bad, unsuccessful or guilty about. Setting up this structure is a critical element in staying on track. People with written plans accomplish 10-50 times more than others.

Use a separate sheet for each of your three goals. For each, design these parts of your plan.

GOAL, VALUES & MEASURES OF SATISFACTION: Your goal is the broad result. As you discover how it expresses your core values, you feel and see the connection to the "why" you want this. Your measures of satisfaction should be specific and measurable. You can add more than 3, if you like. They tell you if you got what you pictured and give you a way to measure along the way.

RESOURCES: When you look back from having accomplished that perfect year, there were people, places and things available to you that made it possible. To achieve your goals, you may need to hire someone else, buy some new equipment or technology, or begin to expand your sphere of influence. For instance, if you were to double your income this year, where would the breakdowns or bottlenecks in your systems occur? What new equipment, training, people you would need? Plan now how and when you will get these resources. Also, look at the resources you already have in place to see how they can be more fully utilized or leveraged. What more could you do with what you already have? This is especially useful in the realm of people and relationships. There are people who would love to help you, if you would quit being a lone ranger, and tell them how they can!

ACTIONS: Knowing, on a daily & weekly basis, what actions you need to take is crucial. The magnitude of the actions must be aligned with the goal. If you are going to run a marathon, exercising twice a week won't cut it! So let's look: If it takes 5 calls to generate an appointment and 3 appointments to make a sale and your goal is based on 1 sale a week, 15 calls per week should create the result. **NOW:** here is where the concept of reserve comes in. Plan to make at least 22 calls each week to build the reserve and give you "insurance". Schedule daily actions or consistent weekly actions. As you do this consistently, these actions will become habits. Get out your calendar for the next 12 months & time frame those actions for the whole year. Plan about 30% reserve into your numbers, so when something you have counted on doesn't come through, you have more than you need.

SUPPORT: Ask for and plan for MORE support than you need as well! Coaches, mentors, bosses, friends and partners all qualify. The more people you involve in your goals, the better chance you have of accomplishing them. There will be days (or weeks) when you don't want support but, because you have involved others, it will be easier to stay on track or get unstuck! Someone who is looking from another perspective can give you just the message you need. Or someone who will be honest when you are off base! Everyone thrives with cheerleaders!



Creating An Awesome Year ... Step Three

The Goals ... #1

"Don't be afraid of the space between your dreams and reality. If you can dream it, you can make it so." - Belva Davis

GOAL #1 _____ **Core Value(s) That This Ties To:** _____

Measure of Satisfaction: _____

Measure of Satisfaction: _____

Measure of Satisfaction: _____

PEOPLE &/OR RESOURCES

HAVE:

NEED:

EQUIPMENT/TECHNOLOGY RESOURCES

HAVE:

NEED:

EDUCATION &/OR MIND RESOURCES

HAVE:

NEED:

SUPPORT

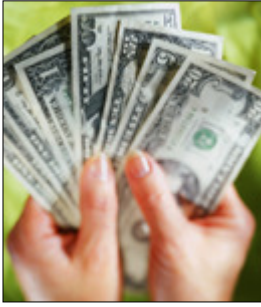
WHO:

HOW:

IMPORTANT ACTIONS TO TAKE CONSISTENTLY

DAILY :

WEEKLY:



Creating An Awesome Year ... Step Three

The Goals ... #2

"Any intelligent fool can make things bigger, more complex, and more violent. It takes a touch of genius -- and a lot of courage -- to move in the opposite direction." - Albert Einstein

GOAL #2 _____ **Core Value(s) That This Ties To:** _____

Measure of Satisfaction: _____

Measure of Satisfaction: _____

Measure of Satisfaction: _____

PEOPLE &/OR RESOURCES

HAVE:

NEED:

EQUIPMENT/TECHNOLOGY RESOURCES

HAVE:

NEED:

EDUCATION &/OR MIND RESOURCES

HAVE:

NEED:

SUPPORT

WHO:

HOW:

IMPORTANT ACTIONS TO TAKE CONSISTENTLY

DAILY :

WEEKLY:



Creating An Awesome Year ... Step Three

The Goals ... #3

"There is a gigantic difference between earning a great deal of money and being rich." - Marlene Dietrich

GOAL #3 _____ Core Value(s) That This Ties To: _____

Measure of Satisfaction: _____

Measure of Satisfaction: _____

Measure of Satisfaction: _____

PEOPLE &/OR RESOURCES

HAVE:

NEED:

EQUIPMENT/TECHNOLOGY RESOURCES

HAVE:

NEED:

EDUCATION &/OR MIND RESOURCES

HAVE:

NEED:

SUPPORT

WHO:

HOW:

IMPORTANT ACTIONS TO TAKE CONSISTENTLY

DAILY :

WEEKLY:



Creating An Awesome Year ... Step Four

The Foundation

*"A system is described as operating at maximum performance when it's operating with ease of efficiency. Ease results from relaxation. Efficiency results from optimal use of energy."
- Lance Giroux, The Mental Game*

YOUR PERSONAL FOUNDATION: The bigger your goals, the bigger and more solid foundation you need. Just as a building needs a deeper and stronger foundation to rise high, a human needs certain elements in place to soar. Integrity in all parts of your life enables you to increase your responsibility and success and add to your accomplishments.

The "Clean Sweep Program" is included on the following pages. You may want to make several copies before you start. This program is designed to measure your personal integrity in four major areas of your life. When you have all 100 items complete, your foundation is very strong. When many items are not complete, there is often upset that sidetracks us from having 100% attention or energy available for our goals. Putting these items in place stops the energy drain and makes us feel good about ourselves and our lives.

Fill out the program to assess where you are right now. Don't judge this. It just "is" where you are right now. Develop a plan for the year that is consistent with your goals, to raise your score. A score of 80 or so will give you a base in place that will make it easier to succeed. The higher your goals, the higher score you'll need. If your goals are exceedingly high, your score will need to be in the 90-100 range.

CLEAN SWEEP: Today's Date _____ Score: _____

To reach my goals, I will increase my score to _____.

I will add _____ points to my score each month.

Month	Begin	End	Month	Begin	End
January			July		
February			August		
March			September		
April			October		
May			November		
June			December		

The Clean Sweep Program



Developed by [Thomas J. Leonard](#) Founder, [Coach U](#)

Introduction

You have more natural energy when you are complete with your environment, well-being, money and relationships. The Clean Sweep program consists of 100 items which, when completed, give you the vitality and strength that you want. The program can be completed in less than one year. Congratulations on starting this one!

Instructions

1. Answer each question. Be rigorous with yourself. If the statement is sometimes or usually true, please do not check the YES box until the statement is virtually always true for you. If the statement does not apply to you, or will never be true for you then check the YES box. You get credit because it doesn't apply or won't ever happen.

2. Copy this form so that you will have a record of your responses, and a reminder of the areas of improvement.

Environment

No Yes

- ___ ___ 1. My personal files, papers and receipts are neatly filed away.
- ___ ___ 2. My car is in excellent condition. (Doesn't need mechanical work, repairs, cleaning)
- ___ ___ 3. My home is neat and clean. (Vacuumed, closets clean, no clutter, furniture in good repair; windows clean)
- ___ ___ 4. My appliances, machinery and equipment work well.
- ___ ___ 5. My clothes are all pressed, clean & make me look great. (No wrinkles, baskets of laundry, torn, out of date or ill-fitting clothes)
- ___ ___ 6. My plants and animals are healthy. (Fed, watered, getting light and love)
- ___ ___ 7. My bed/bedroom lets me have the best sleep possible. (Firm bed, light, air)
- ___ ___ 8. I live in a home/apartment that I love.
- ___ ___ 9. I surround myself with beautiful things.
- ___ ___ 10. I live in the geographic area of my choice.
- ___ ___ 11. There is ample and healthy lighting around me.
- ___ ___ 12. I consistently have adequate time, space and freedom in my life.
- ___ ___ 13. I am not damaged by my environment.
- ___ ___ 14. I am not tolerating anything about my home or work environment.
- ___ ___ 15. My work environment is productive and inspiring. (Synergistic, no undue pressure)
- ___ ___ 16. I recycle.
- ___ ___ 17. I use non ozone depleting products.
- ___ ___ 18. My hair is the way that I want it.
- ___ ___ 19. I surround myself with music which makes my life more enjoyable.
- ___ ___ 20. My bed is made daily.
- ___ ___ 21. I don't injure myself, fall or bump into things.
- ___ ___ 22. People feel comfortable in my home.
- ___ ___ 23. I drink purified water.
- ___ ___ 24. I have nothing around the house or in storage that I do not need.
- ___ ___ 25. I am consistently early or easily on time.

___ ___ Section Total

Well-Being

No Yes

- ___ 26. I rarely use caffeine. (Chocolate, coffee, colas, tea) less than 3 times per week, total.
- ___ 27. I rarely eat sugar. (Less than 3 times per week)
- ___ 28. I rarely watch television. (Less than 5 hours per week)
- ___ 29. I rarely drink alcohol. (Less than 2 drinks per week)
- ___ 30. My teeth and gums are healthy. (Have seen a dentist in last 6 months)
- ___ 31. My cholesterol count is healthful.
- ___ 32. My blood pressure is healthful.
- ___ 33. I have had a complete physical exam in the past 3 years.
- ___ 34. I do not smoke tobacco or other substances.
- ___ 35. I do not use illegal drugs or misuse prescribed medications.
- ___ 36. I have had a complete eye exam in the past 2 years. (Glaucoma check, vision test)
- ___ 37. My weight is within my ideal range.
- ___ 38. My nails are healthy and look good.
- ___ 39. I don't rush or use adrenaline to get the job done.
- ___ 40. I have a rewarding life beyond my work or profession.
- ___ 41. I have something to look forward to virtually every day.
- ___ 42. I have no habits which I find to be unacceptable.
- ___ 43. I am aware of the physical or emotional problems or conditions I have, & I am now fully taking care of all of them.
- ___ 44. I consistently take evenings, weekends & holidays off & take at least 2 weeks of vacation each year.
- ___ 45. I have been tested for the AIDS antibody.
- ___ 46. I use well made sunglasses. ___ 47. I do not suffer.
- ___ 48. I floss daily.
- ___ 49. I walk or exercise at least three times per week.
- ___ 50. I hear well.

- ___ Section Total

Money

No Yes

- ___ 51. I currently save at least 10% of my income.
- ___ 52. I pay my bills on time, virtually always.
- ___ 53. My income source/revenue base is stable and predictable.
- ___ 54. I know how much I must have to be minimally financially independent and I have a plan to get there.
- ___ 55. I have returned or made-good any money I borrowed.
- ___ 56. I have written agreements & am current with payments to individuals or companies to whom I owe money.
- ___ 57. I have 6 months' living expenses in a money market-type account.
- ___ 58. I live on a weekly budget which allows me to save and not suffer.
- ___ 59. All my tax returns have been filed and all my taxes have been paid.
- ___ 60. I currently live well, within my means.
- ___ 61. I have excellent medical insurance.
- ___ 62. My assets (car, home, possessions, treasures) are well-insured.
- ___ 63. I have a financial plan for the next year.
- ___ 64. I have no legal clouds hanging over me.
- ___ 65. My will is up-to-date and accurate.
- ___ 66. Any parking tickets, alimony or child support are paid and current.
- ___ 67. My investments do not keep me awake at night.
- ___ 68. I know how much I am worth.
- ___ 69. I am on a career/professional/business track which is or will soon be financially and personally rewarding.
- ___ 70. My earnings are commensurate with the effort I put into my job.

- ___ 71. I have no "loose ends" at work.
- ___ 72. I am in relationships with people who can assist in my career/professional development.
- ___ 73. I rarely miss work due to illness.
- ___ 74. I am putting aside enough money each month to reach financial independence.
- ___ 75. My earnings outpace inflation, consistently.

___ Section Total

Relationships

No Yes

- ___ 76. I have told my parents, in the last 3 months, that I love them.
- ___ 77. I get along well with my sibling(s).
- ___ 78. I get along well with my co-workers/clients.
- ___ 79. I get along well with my manager/staff.
- ___ 80. There is no one who I would dread or feel uncomfortable "running across". (In the street, or at a party)
- ___ 81. I put people first and results second.
- ___ 82. I have let go of the relationships which drag me down or damage me.
(“Let go” means to end, walk away from, declare complete, no longer be attached to)
- ___ 83. I have communicated or attempted to communicate with everyone who I damaged, injured or seriously upset, even if it wasn't fully my fault.
- ___ 84. I do not gossip or talk about others.
- ___ 85. I have a circle of friends/family who love & appreciate me for who I am, more than just what I do for them.
- ___ 86. I tell people how they can satisfy me.
- ___ 87. I am fully caught up with letters and calls.
- ___ 88. I always tell the truth, no matter what.
- ___ 89. I receive enough love from people around me to feel good.
- ___ 90. I have fully forgiven those people who have hurt/damaged me, intentional or not.
- ___ 91. I am a person of his/her word; people can count on me.
- ___ 92. I quickly correct miscommunications and misunderstandings when they do occur.
- ___ 93. I live life on my terms, not by the rules or preferences of others.
- ___ 94. I am complete with past loves or spouses.
- ___ 95. I am in tune with my wants and needs and get them taken care of.
- ___ 96. I do not judge or criticize others.
- ___ 97. I do not "take personally" the things that people say to me.
- ___ 98. I have a best friend or soul-mate.
- ___ 99. I make requests rather than complain.
- ___ 100. I spend time with people who don't try to change me.
- ___ Section Total

___ **Grand Total**

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Creating An Awesome Year ... Step Five

Receiving Support

"If you have an apple and I have an apple and we exchange these apples, then you and I will still each have one apple. But if you have an idea and I have an idea and we exchange these ideas, then each of us will have two ideas." - George Bernard Shaw

To be extraordinary, rather than ordinary this year, you'll need the strongest support system you've ever had. Take steps now to create this structure to provide what you will need this year.

YOUR SUPPORTERS: List your top 10 supporters. These people want big things for you, see you as someone even larger than you see yourself, sometimes, and they give you confidence. Schedule a time with each to share your vision for the coming year. Acknowledge them for the support they have given you in the past. Tell them how much it has supported you and how much you appreciate it.

BUILDING SUPPORT: You have to train people to give you what you need. Certain people may not know what you need or how to support you. List the people who need training or coaching to treat you how you need to be treated. Tell them what you need or put a boundary in place.

DRAINING PEOPLE: Say goodbye to the people that drain, abuse, hurt or limit you. They are just where they need to be on their own path, but it doesn't fit with what you need right now. Their presence takes away valuable energy for other things. Let them go for now. You may have already done this in previous pages, but also, decide in terms of clients what your perfect client profile is and what people you'd be better off referring out.

BUILDING ASSISTANCE: There are tasks and processes that you struggle with, which others love to do. Delegate your weaknesses to these people. Find creative ways to get administrative tasks done. Who should be added to your team to have an awesome year?

Task:	Person:	# of Hours/Week	Cost / Week



Creating An Awesome Year ... Step Six

Show Me The Money!!

“You cannot motivate the best people with money. Money is just a way to keep score. The best people in any field are motivated by passion.” - Erie S. Raymond in FastCompany Magazine

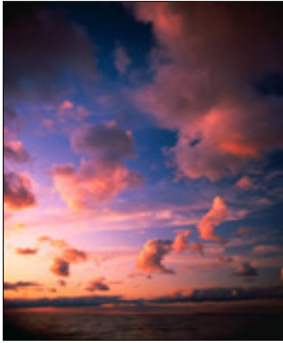
Focus on **profitability** and **savings** as well as increasing production. Your path to financial independence must include retirement planning, as well as a goal for the next year. Building net worth is an ultimately more important goal than just making and spending more. Are you funding a life or a lifestyle? How can you simplify this year? What easy ways can you cut back?

NET WORTH: Your net worth is one of the best ways to measure your financial growth. You can increase your net worth in 3 ways: Reduce Expenses, Save & Invest or Increase Income. The best result combines all three.

Take the numbers you researched in part one on page 6 and transfer below. Then decide what you want to create for the coming 12 months.

Assets	Today	In 12 Mo	Liabilities	Today	In 12 Mo
Cash	\$	\$	Current Bills	\$	\$
Bank Balance(s)	\$	\$	Mortgages	\$	\$
IRA's/Retirement	\$	\$	Credit Cards	\$	\$
Vehicle(s)	\$	\$	Car Loans	\$	\$
Home	\$	\$	Personal Debt	\$	\$
Furnishings	\$	\$	Business Equipment	\$	\$
Jewelry/Art	\$	\$	Other	\$	\$
Equipment	\$	\$		\$	\$
Other	\$	\$		\$	\$
TOTAL ASSETS	\$	\$	TOTAL LIABILITY	\$	\$

	@ Today	@ In 12 Mo
Total Assets	\$	\$
Less Total Liabilities	\$	\$
NET WORTH	\$	\$



Creating An Awesome Year ... Step Six

The Money!! ... (continued)

"I've never been poor—only broke. Being poor is a frame of mind. Being broke is only a temporary situation." - Mike Todd

WHEN WILL YOU REACH FINANCIAL INDEPENDENCE?

Have you figured out what it will take to be financially independent?

What is your plan to get there?

- Real Estate Investments
- Real Estate IRA's
- Retirement Savings
- Bonds and Stocks
- Hope I'll win the Lottery

I will be financially independent when my net worth is: \$ _____

WHAT INCOME STREAMS WILL CONTRIBUTE TO THIS?

Income Stream

(Example: Buy Investment Properties)

Actions To Build

(Example: Purchase 1 Property A Year)

Your Net Worth Goals:

12/31/2008

12/31/2009

12/31/2013

12/31/2018

My Target Date For Financial Independence: _____

\$ _____

\$ _____

\$ _____

\$ _____

THE FUTURE : I will save a minimum of _____% of my gross income this year for retirement.
I will deposit this from EVERY Check.

What's Technology Got To Do With It?

"Any sufficiently advanced technology is indistinguishable from magic." - Arthur C. Clarke

Priority	Tool	Cost	Have	Need	By When
BASIC	Cell Phone				
	Digital Camera				
	Notebook/Tablet Computer				
	Professional Email				
	Domain Name				
	Contact Manager				
	Basic Website				
	Fax				
	Have A Techie				
Advanced	PDA/ SmartPhone				
	Visual Tour Software				
	Portable Printer				
	Customized Website				
	1-800 Response Line				
	Presentation Software				
	Advanced E-mail Services				
	E-fax				
	Wireless				
	CD Business Card				
	Camcorder				
	Web Enabled Phone				
	GPS				
	Blog				
	Virtual Assistant				

Your Tech Plan is a piece of your overall plan

For the coming year, what do you need to do to close the gap between where you are now and where you want to be? _____

What % of your total budget will be allocated to technology?

_____% = \$ _____

What are the next 3 steps you will take with technology?

- 1.
- 2.
- 3.

Which of these tools would give you the biggest return for your investment?

What education do you need?

Are you an e-PRO? Yes No

Do you need someone to outsource to? Yes No

Worksheet for Real Estate Numbers

Area of Focus	My Business 2007		My Business 2008	
Yearly Gross Income	<i>Listings</i>	<i>Buyers</i>	<i>Listings</i>	<i>Buyers</i>
Business Expenses	<i>Listings</i>	<i>Buyers</i>	<i>Listings</i>	<i>Buyers</i>
Net Income	<i>Listings</i>	<i>Buyers</i>	<i>Listings</i>	<i>Buyers</i>
Hours Worked Weekly				
Worth Per Hour	\$		\$	
# of Listings Taken				
Total Listings Sold				
Average Listing Price				
# of Buyer Sales				
Average Sales Price				
Listing/Sales Ratio	<i>Listings</i>	<i>Buyers</i>	<i>Listings</i>	<i>Buyers</i>
Number of Closed Units				

Focus on **profitability** and **savings** as well as increasing production. Your path to financial independence must include retirement planning, as well as your goals for the year. Building net worth is an ultimately more important goal than just making and spending more.

It's Not What You Make, It's What You Keep.

What Changes Do You Need To Make To Move from Where You Are To The Ideal?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

“Ultimately the greatest form of creativity is the re creation of yourself and moreover the creative work you do on yourself will heighten your capacity for creativity on other things” - Jean Houston



Creating An Awesome Year ... Step Seven

Attitude IS Everything!

You Get What You Expect

*"It is what a man thinks of himself that really determines his fate."
- Henry David Thoreau*

Now that you know how the next 12 months will look, you have a structure to support your goals. Where do you get in your own way? What stumbling blocks might get in the way of this being manifested?

ASSUMPTIONS: Your present life is a reflection of the choices you have made. Your choices are made based upon your assumptions and perception. For instance: If you believe *"you have to work hard to make money"*, you might discount or miss entirely the easy way to do things. A new assumption could be *"When you work with passion, you make money."* Or, If you believed *"there's never enough time to do what I am doing now"* or *"everything always happens to cause my deals to fall through"*, that's probably what you get. If, on the other hand, you believe *"there's a hidden opportunity when a problem occurs"*, you may feel differently about both the circumstance and your ability to respond. What assumptions or beliefs are in the way of producing your best year ever? What is the cost/result of the old belief? What new belief can you replace it with? This is a biggie. Look at where you are stuck and think about what rule or assumption you believe in. These may be deeply embedded. Take time to investigate. A fundamental shift in beliefs can dramatically and immediately impact your results and transform your ability to create magic.

CURRENT ASSUMPTION	COST / RESULT	NEW ASSUMPTION
1.		
2.		
3.		
4.		
5.		
6.		
7.		



Creating An Awesome Year ... Step Seven

Attitude ... (continued)

*Life isn't about waiting for the storm to pass...
It's about learning to dance in the rain.*

PRACTICES: What actions or habits, done on a daily basis, would give you energy, further your vision and make you feel good? No SHOULDs on this list. Only those items that renew, excite and rejuvenate you!

I CALL THESE "DELICIOUS DAILY HABITS!":

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

STANDARDS: By examining and raising your personal standards, you'll feel good about yourself and know that you are "raising the bar." Standards are what we hold ourselves to which represent our best self. What new or raised standards would be helpful in manifesting your vision of the coming year? Perhaps "*I don't stay upset longer than 10 minutes over anything I can't change*" or "*I don't gossip*". Or "*For every problem that happens, I will find a way to learn from it and strengthen my systems or boundaries.*"

NEW STANDARDS TO SUPPORT AN AWESOME YEAR:

- _____
- _____
- _____
- _____

SELF TALK: If you are like most people...you have a gremlin voice (or voices) living inside your head (**rent free** **might add**) that shapes your actions and assesses your results. You can believe what this gremlin tells you without examining it or you can choose to believe **ONLY** the messages that empower you, ignoring the ones that don't. This voice of fear is actually your friend and is there to protect you. Unexamined, you are reactive and sometimes, left scared. When you examine the message, you will often see you have grown beyond needing to be scared and what once was an appropriate fear, is no longer valid. Now, you have a choice to react or ignore. So, thank the gremlin for being worried about you and for alerting you to danger and tell it you can take care of yourself! Then choose your actions based on your **new assumptions, standards and dreams**. Design 10 affirmations that express who you will be this year. Example: "I provide so much value to my clients they are constantly referring business to me." or "I have ample time to do my job and relax and enjoy my life."

SELF TALK TO SUPPORT AN AWESOME YEAR:

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |



Creating An Awesome Year ... Step Eight Zap The Problems

*"There is no duty we so underrate as the duty of being happy. By being happy we sow anonymous benefits upon the world."
- Robert Louis Stevens*

Become A Problem-Free Zone: It really is possible to live without going from crisis to crisis. When you are pro-active, you take into consideration the potential roadblocks that might sidetrack or stop your progress towards your goals and create solutions or "PLAN B's" so you are prepared for whatever happens.

What single thing is causing you the most grief? _____

What can be done to eliminate it? _____

By when will you do this? _____

Potential Problems or Obstacles: Identify the areas that problems or roadblocks could occur. How can you be proactive? What actions can you take now to prevent them from causing failure?

POTENTIAL PROBLEM:

ACTION TO PREVENT:

Boundaries To Set: Some problems occur because we have weak boundaries. A boundary is an imaginary line we draw around us to protect ourselves from hurt, damage or injury. Are there some boundaries you need to set to stave off problems with others. Communicate and make requests of those who cause problems.

DONE

WITH WHOM:

BOUNDARY TO SET:

Creating An Awesome Year ... Step Ten

Theme For The Year

"Be patient toward all that is unsolved in your heart and try to love the questions themselves like locked rooms and like books that are written in a very foreign tongue. Do not now seek the answers, which cannot be given you because you would not be able to live them. And the point is, to live everything. Live the questions now. Perhaps you will find them gradually, without noticing it, and live along some distant day into the answer." - Rainer Maria Rilke, German poet

Wow! ... Look What You Have Created!!!!

Congratulations for completing this workbook. You deserve to be proud of the work you have done to create an awesome future. You've created a year that will unfold its treasures because you did the work to uncover the vision, the plan and the meaningful components that produce miracles! Take a deep breath, feel the accomplishment and now take this one last step:

My Theme: Choose an appropriate theme for the coming year: a few words that help you focus clearly on what you have created for the year. What simple phrase sums this up for you?

MY THEME FOR THE YEAR IS: _____

**Now, put this workbook in a place where you will keep it as a work in progress
And take these steps:**

1. Take the 4-page plan and post it, or keep it in front of your DayTimer
2. Make copies and use the Productive Day Planner Page to stay focused and on track
3. Work Your Plan & Re-Assess as shown below: **Manage The Result By Regular Course Corrections**
#1 – YEARLY: Put all potential projects and ideas on "goal sheets" when doing your yearly planning
#2 – QUARTERLY:
 - ✓ Review your key numbers.
 - Are you on track?
 - What is working? Can you do more of that?
 - What isn't working? Should you re-adjust some marketing?
 - Has the market shifted (check your assn. stats)?
 - ✓ Review your strategies for the year. Assess what is working and what is not working. Determine if this strategy is on track and, if not, what course corrections need to be made.
 - ✓ Select projects for each quarter from goal sheets. Add primary action steps and identify resource needs/barriers.**#3 – MONTHLY:**
 - ✓ Review your key numbers.
 - ✓ Select next month's project(s) from the quarterly list.
 - Add responsibilities (who) & times estimates (how long).
 - Place into time blocks for next month
 - Remember "Joeann's Rule of 3".**#4 – Choose 1 System To Review And Upgrade.**

Then use it to acknowledge yourself at the end of the 12 months

.....as you look back over an awesome year!

MY 3-PAGE BUSINESS PLAN

My Theme For The Year Is: _____

My Vision: _____

My Mission: _____

My Core Values I Will Honor: #1 _____ #2 _____

#3 _____ #4 _____ #5 _____

My Important Roles: #1 _____ #2 _____

#3 _____ #4 _____ #5 _____

Why My Ideal Client Fits This Profile:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

The 3 Niches and 3 Strategies I Will Develop And Implement Are:

1. _____
 - a. _____
 - b. _____
 - c. _____
2. _____
 - a. _____
 - b. _____
 - c. _____
3. _____
 - a. _____
 - b. _____
 - c. _____

The 5 Strategic Partners I Will Include On The Team This Year Are:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

10 GREAT THINGS I'M GOING TO DO FOR ME!

What adventures, joys, purely selfish pleasures, projects, new skills, family vacations or activities, outdoor activities, hobbies, and personal accomplishments will make this coming year memorable?

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

10 DELICIOUS DAILY HABITS

These refuel your system. You can tweak this, as something becomes a habit and you want to add something new. Identify 10 things / practices to include during your day that will give you energy.

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

10 TOLERATIONS OR RESENTMENTS TO ZAP

When we put up with things it drains energy. When we hold grudges or resentments, it hurts us more than the other person. To create more joy and energy, where can you see you could let go?

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

	What Is Most Important Today?	Finish Yesterday
Morning Focus	Today's Focus: 1. _____ 2. _____ 3. _____	<input type="checkbox"/> Planner <input type="checkbox"/> To Do <input type="checkbox"/> Follow-Up
	Today's Self-Care: 1. _____ 2. _____	<input type="checkbox"/>
	To Complete: 1. _____ 2. _____	<input type="checkbox"/>

Time	Appointment/Activity	Focus/ Benefit	To Do's
7 AM			<input type="checkbox"/>
8			<input type="checkbox"/>
9			<input type="checkbox"/>
10			<input type="checkbox"/>
11			<input type="checkbox"/>
Noon			<input type="checkbox"/>
1 PM			<input type="checkbox"/>
2			<input type="checkbox"/>
3			<input type="checkbox"/>
4			<input type="checkbox"/>
5			<input type="checkbox"/>
6			<input type="checkbox"/>
7			
8			

		Things I completed
End Of Day Focus	Tomorrow's Focus: 1. _____ 2. _____	<input type="checkbox"/> Work area <input type="checkbox"/> Self Care <input type="checkbox"/> Grateful <input type="checkbox"/> Ready For Tomorrow
	I am grateful for: 1. _____ 2. _____ 3. _____ 4. _____	Things I accomplished:
Needs Completion	1. _____ 2. _____	