

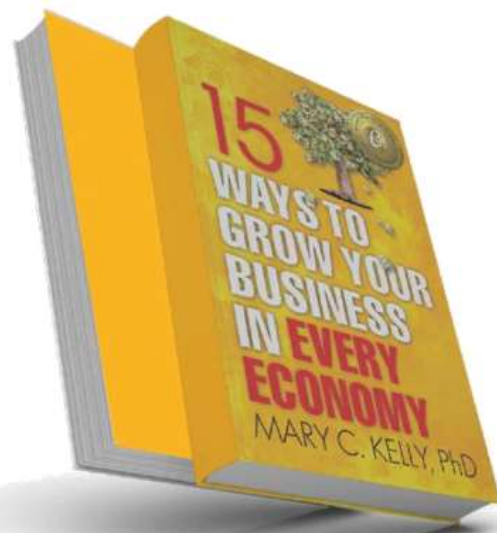
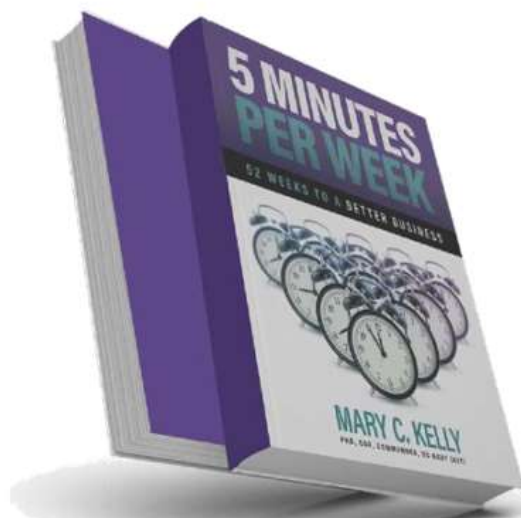
# 12 MONTHS OF BUSINESS GROWTH

ACCOUNTABILITY

PRODUCTIVITY TOOLS

STRATEGIC PLANNING

WORK THROUGH **A 5-MINUTE PLAN** EVERY  
MONTH TO BUILD A BETTER BUSINESS



[WWW.PRODUCTIVELEADERS.COM](http://WWW.PRODUCTIVELEADERS.COM)

Thank you for getting this planner. I have been using this as a guide for my teams and masterminds for years and we are delighted to formalize it to help even more people become even more successful.

Leaders, managers, and supervisors are all busy. Everyone is dealing with challenges, changes, and day-to-day operations. It is easy to get wrapped up in the day-to-day tasks that we all have to do that we sometimes forget to plan the activities that are going to move us forward. We all feel as though we are short on time. To maximize the time we have, we need to be very intentional on what we do and how we do it.

The goal of this monthly strategic planner is to help plan our time and think through what we really want to accomplish every month. Filling in the blanks or writing it down helps to keep us accountable. If you are part of a mastermind or business accountability group, these monthly pages can be a helpful way to stay focused.

Every month there is a 5-minute plan to work through as well. These come from the book, *5 Minutes Per Week: 52 Weeks to Building a Better Business*. That book is divided into five sections: business planning, business growth, productivity, leadership, and teamwork. The idea is to work through a 5-minute plan once a week over the course of a year. That book also includes over 70 of my 5-minute plans in an online vault as fillable PDFs for downloading, sharing, and working through the forms online. As new business challenges emerge, we add more of the 5-minute plans to the vault. We want to be solving your problems, so if you have any ideas, please send them to [info@productiveleaders.com](mailto:info@productiveleaders.com). We included the 5-minute plans that we thought would be most helpful to you here.

I would love to hear what you think, and how we can improve this 12-month planner. Please email me directly at [Mary@productiveleaders.com](mailto:Mary@productiveleaders.com) or call 719-357-7360.

Thank you so much!

Mary C. Kelly  
[www.ProductiveLeaders.com](http://www.ProductiveLeaders.com)

P.S. To start the process, we have two bonus 5-minute plans – the 5-Minute Mindset Optimization Plan and the 5-Minute Work-Life Balance Plan.

P.S.S. Additional bonuses are at the end with the 5-Minute Work From Home Plan and the Productivity Plans.



# 5-MINUTE MINDSET OPTIMIZATION PLAN

A large part of personal and business success is determined by how and where we focus our thinking, efforts, and resources. What and who we surround ourselves with, how we take care of ourselves, what we say, and where we put our attention matters. Take notice of how we think, where we invest our energy, and the environment we cultivate.

- Yes    Maybe    No   I am successful in my occupation.
- Yes    Maybe    No   My business focus can be even more successful.
- Yes    Maybe    No   I surround myself with positive people.
- Yes    Maybe    No   My closest friends do not complain a lot—they seem mostly happy.
- Yes    Maybe    No   When I work, I feel energized.
- Yes    Maybe    No   I have daily habits for success.
- Yes    Maybe    No   I engage in healthy eating habits.
- Yes    Maybe    No   I exercise or move my body regularly.
- Yes    Maybe    No   I actively practice gratitude on a daily basis.
- Yes    Maybe    No   I partner with others to increase success.
- Yes    Maybe    No   I seek coaching/advice to guide my path towards greater achievement.
- Yes    Maybe    No   I have a system in place to hold myself accountable.

*People who answer yes to most of these questions tend to have more resilience and a solid support foundation. However, everyone can always improve!*



# 5-MINUTE WORK-LIFE BALANCE PLAN

Promoting work-life balance starts with leadership. Leaders need to recognize that employees need time away from work to re-energize, re-charge and re-focus. Many career-minded people are so focused on work that they work extra hours, don't use their vacation, and respond to emails on weekends.

People are our talent and top performers are in danger of burnout, chronic stress, and other associated health problems.

## A good leader knows how to help people achieve an optimal work-life balance

Workaholics need to be assured that their jobs are safe and that they need to take time off.

Overly relaxed workers need to be held accountable for deadlines.

### Both can be helped by:

- Cooperatively setting realistic goals.
- Adjusting expectations for realistic performance.
- Allocating proper amounts of time for a project — not more and not less.

### I can help people on our team budget time by:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Leaders make it clear that taking vacation is expected

### To encourage people to take vacation:

- Leaders need to set the example by taking their own vacations.
- Provide work coverage for the person who is gone.
- Make time off a normal part of the work year.

## Leaders honor their own stated work hours

Many managers don't realize that their actions betray their words regarding work-life balance. They may say that working hours are 8 a.m.-4:30 p.m., but if they then show up at 7 a.m. and stay until 7 p.m., their teams receive a mixed message and may feel that they have to do the same.

## Other ways leaders can help with work-life balance

- Provide flexibility regarding what hours employees actually need to spend at work.
- Consider allowing remote work. This means employees are assessed on their outcomes instead of hours worked.
- Offer unique, healthy perks such as gym memberships and spa coupons.
- Be clear about expectations for answering work communications on nights and weekends.

### I can promote a healthier work-life balance by:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

# JANUARY

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

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This month I am going to streamline this process:

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This month I am going to complete this project:

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This month I am going to resolve this situation:

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I will contact these 3 people for advice:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

I will reach out to these 3 potential decision-makers/clients:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

# Monthly Action Plan

Day	Task	Priority	Time in Minutes	Due
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# 5-MINUTE VISION PLAN

Our mission is what we do, such as “we play baseball.”

A vision is “we are going to the World Series.”

Leaders need to create a vision that gives people purpose and direction,  
and coalesces them around a goal bigger than themselves.

**Before establishing the vision, we need to know our mission.**

**What do we actually do?**

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**Who do we serve now?**

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**Think about the Really Big Picture to create the vision.**

With a clearly understood mission, we can move into creating the vision.

Strategic thinking considers the big picture, potential changes, and every possible variable.

**Who will we serve in the future?**

**In 5 years?**

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**In 10 years?**

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**In 20 years?**

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**What major changes will we see in the future?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**How will these changes affect our purpose?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**What legacy do we want to leave? What do we want to be known for?**

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**If there were no constraints, what would we do?**

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**What is our vision?**

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# February

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to streamline this process:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to complete this project:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to resolve this situation:

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I will contact these 3 people for advice:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I will reach out to these 3 potential decision-makers/clients:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Monthly Action Plan

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# 5-MINUTE BUSINESS GROWTH PLAN

Growing a business involves thousands of details. Sometimes we need to take a step back to discern what will take us to the next level. This assessment identifies where you're strong, what needs attention, and how to proceed.

**We have a business plan that accurately describes our business.**

Yes  Maybe  Not Sure  No

**We have a strategic vision for our business that is driving us toward future success.**

Yes  Maybe  Not Sure  No

**Everyone is clear on our goals for moving the organization forward.**

Yes  Maybe  Not Sure  No

**We know our break-even points, as well as our total revenue, total cost, and profits.**

Yes  Maybe  Not Sure  No

**We have systems in place for actively generating, receiving, and thanking referrals.**

Yes  Maybe  Not Sure  No

**We have systems in place to show customers our appreciation for their business.**

Yes  Maybe  Not Sure  No

**We have systems in place for getting honest feedback.**

Yes  Maybe  Not Sure  No

**Our website is easy to navigate.**

Yes  Maybe  Not Sure  No

**Our website is mobile friendly.**

Yes  Maybe  Not Sure  No

**Our social media is updated consistently and linked to our website.**

Yes  Maybe  Not Sure  No

**Our website can capture customer contact information.**

Yes  Maybe  Not Sure  No

**We have trusted advisors to keep us on track such as a corporate advisor, board of directors, or a mastermind.**

Yes  Maybe  Not Sure  No

**We devote resources on professional training for our team.**

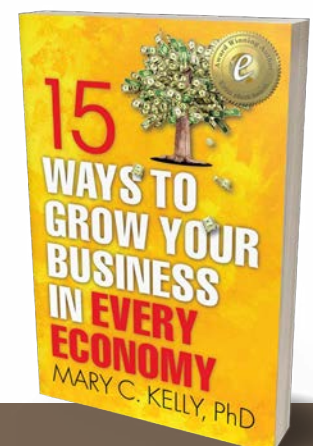
Yes  Maybe  Not Sure  No

**Everyone on our team knows how to take great care of our customers.**

Yes  Maybe  Not Sure  No

**We follow up with our clients the way we should.**

Yes  Maybe  
 Not Sure  No



# March

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to streamline this process:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to complete this project:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to resolve this situation:

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I will contact these 3 people for advice:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I will reach out to these 3 potential decision-makers/clients:

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

On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Monthly Action Plan

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# 5-MINUTE OPPORTUNITY PLAN

**In the middle of fast-paced changes and a fluctuating environment, it is easy to freeze into inactivity. During times of turmoil and disruption is when people need their leaders the most. This is also the time to find opportunities.**

Humans do not like change. We prefer security and stability, which is why change, for most people, is difficult. The habenula, that part of our brain which helps us deal with change, doesn't like it. Once we accept the change, we tend to adapt fairly quickly.

For some people, it is tough to see opportunities when situations are changing, especially if they are changing due to events outside of our control. Great leaders are not only resilient during adversity, they also synthesize information quickly, and then take the right action fast. They are able to see opportunities even in tough situations.

Every challenge brings with it the opportunity to help others, solve problems, and move forward. As leaders, that is why we are here.

## **It is helpful to ask questions such as:**

Where are there unmet needs where we can help?

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Where can I best serve other people?

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Where can I best serve my team?

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Where can we best serve our clients, customers, patients, and members?

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What are my people's immediate needs right now?

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If I had plenty of money, resources, and time, what would I do first?

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What needs to be invented to solve this problem?

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What is the craziest possible idea for this situation?

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What is the craziest impossible idea for this situation?

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What needs to be invented or developed for the impossible solution to work?

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What are the benefits of having this challenge right now?

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In a year, what will we say was a great outcome of this situation?

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# April

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to streamline this process:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to complete this project:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to resolve this situation:

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I will contact these 3 people for advice:

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

I will reach out to these 3 potential decision-makers/clients:

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

On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Monthly Action Plan

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# 5-MINUTE BRAINSTORMING PLAN

Brainstorming with teams and groups is a highly effective way to generate ideas, get suggestions, and develop new offerings. Good leaders know that employees, staff, suppliers, and customers all have unique insights. They also recognize that people want to feel they have a voice in the future of an organization, and their thoughts heard and valued.

## Effective Brainstorming

Remember these points to leverage your brainstorming efforts most effectively.

### Leaders speak last.

In a team meeting, leaders need to speak last, otherwise people perceive that leaders just want their own ideas validated.

### Agree to be open and inclusive.

Before starting, people need to agree that there are no dumb ideas, that all ideas should be heard, and that everyone should contribute.

### Capture ideas.

Ideas that are generated by brainstorming need to be captured in a way that are usable later. Many people use index cards or post-it notes to quickly generate individual ideas, and then they sort them on a wall or large poster. It's also easy to record the meeting and have it transcribed.

### Specificity creates relevance.

Questions for brainstorming need to be focused on a particular area, so that ideas are as relevant as possible.

Overly general questions like "How can we improve the customer experience?" are not as good as specific questions such as:

**1. How can we improve the customer experience in our retail store?**

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**2. How can we improve the customer experience on our website?**

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**3. How can we improve the experience when customers call us?**

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**4. Where can we provide training for our emerging leaders?**

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**5. What types of customers will we serve in 5 years?**

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**6. What types of customers will we serve in 10 years?**

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# May

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to streamline this process:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to complete this project:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to resolve this situation:

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I will contact these 3 people for advice:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

I will reach out to these 3 potential decision-makers/clients:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

# Monthly Action Plan

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# 5-MINUTE CUSTOMER SERVICE PLAN

The best businesses are laser-focused on current and future needs of their customers and other economic buyers. Really great companies understand Say's Law: supply creates its own demand for terrific products and services. We also have to deliver service and experiences in a way that exceeds current customer expectations.

**Answer these questions honestly to explore where your business can improve.**

**Our customers are wowed by every interaction at this organization.**

- Yes! We're at the top of our game!
- Maybe
- Not so much

**How can we find ways we to improve from the customer's point of view?**

- Focus groups
- Polls
- Incentivized surveys
- Phone calls
- Other

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**If we improved our customer's experience, what would that do for the organization?**

1. 

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2. 

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3. 

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**Where can we improve the customer experience?**

1. 

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2. 

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3. 

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**What parts of the buying process stop customers from proceeding with the purchase?**

- First introduction to the product or service
- Website links
- Understanding the product's/service's benefits
- Actual purchase process

**How can we provide additional information/service/value throughout the process?**

Our customers commit to us when we...

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**Our follow-up for our clients is**

- Fabulous!
- Not great
- Cringe-worthy

**We can improve our follow-up by:**

1. 

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2. 

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3. 

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**What can we provide to our clients that adds value for them:**

1. 

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2. 

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3. 

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# June

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to streamline this process:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to complete this project:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to resolve this situation:

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I will contact these 3 people for advice:

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

I will reach out to these 3 potential decision-makers/clients:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Monthly Action Plan

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# 5-MINUTE

## GIVE-UP-GOOD-TO-GET-TO-GREAT PLAN

It is difficult to abandon what's comfortable and relatively good to become uncomfortable in the hopes of becoming great. It may feel like stepping off a cliff. Yet often, that's what it takes. As leaders, we have to find ways to help others push beyond their comfort zones.

Status quo is a comfortable place. We know what we need to do to be fairly successful. We may be comfortable in our jobs, confident in what we know, and performing well.

But the world is changing quickly. Businesses that do not continually improve will wind up stagnating and become obsolete, like the 8-track tape player.

We have to give up good to get to great. That means as leaders, we have to help others explore options and take risks. We have to give up what is merely good today to achieve greatness in the future.

### Who or what is holding me back from my full potential?

Who: \_\_\_\_\_  
\_\_\_\_\_

What: \_\_\_\_\_  
\_\_\_\_\_

### Why is it challenging to get rid of the issues, situations, or people who are holding me back?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Are these obstacles speed bumps or mountains?

*Obstacle* *Speed Bump or Mountain*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### What do I need to stop doing, because I am holding me back?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### What does my "GREAT" look like?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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# July

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to streamline this process:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to complete this project:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to resolve this situation:

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I will contact these 3 people for advice:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

I will reach out to these 3 potential decision-makers/clients:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

# Monthly Action Plan

Day	Task	Priority	Time in Minutes	Due
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# 5-MINUTE SALES PLAN

Everyone in every organization is in sales. Every time you represent yourself or your organization, you are conveying value. Sales is helping people find solutions to their needs.

Most sales specialists agree that the most effective sales transactions are those where both parties feel like they are better off.

**Great sales people know to:**

## 1. Research the customer's needs.

Know their business, their industry, their competition, and their core issues.

## 2. Focus on the customer.

Ask clarifying, specific, and smart questions.

## 3. Suggest the right solutions for the customer's needs.

What do I or my products do to solve my customer's problem?

One of the best pieces of advice I ever got was from my dad at a trade show. I had a couple willing to buy a full case of items when they really only wanted half. My dad said, "Never sell what they don't want."

Almost everyone else is going to try to upsell. When you give people exactly what they want, they remember that. No one likes being oversold.

## 4. Acknowledge the challenges and provide options.

Hopefully, you are the solution, but sometimes you may not be. In that case, know your competition well enough to know when they are a better fit for your customer. Refer your customer to the right source and facilitate the introduction. Again—they will remember.

## 5. See the issue from the customer's perspective.

Be relatable, empathetic, and genuine. No one likes to be sold to, but people like buying. Put yourself in their shoes. How would I feel if I had this issue?

## 6. Agree to work together.

The best transactions are viewed as partnerships. "I am excited to be your partner as we move forward with

## 7. Follow up.

The sales process does not end once the transaction is completed. Stay in touch!



# August

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

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

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On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I learned:

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

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# 5-MINUTE MARKETING PLAN

Every business needs to communicate what they do and who benefits from their products and services. Many businesses practice “spray and pray marketing” or the “shotgun” approach, where they send out promotions without targeting a niche or message. Marketing to “everyone” wastes resources.

Marketing dollars need to focus on the people who want and can buy our products.

### Ideal clients

We all love working with clients who appreciate our products and services. We need to make sure we’re targeting our ideal clients with clear focus. That means knowing who they are, what they want/need, where they “live” (literally and figuratively), and how to address their issues.

**We love working with:**

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**Because they:**

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**They want/like:**

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**We find them by:**

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**We keep in touch with them with by:**

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**Our top clients know we care about them because we:**

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### Communicating

Are we communicating with our clients enough? And in the right ways?

Ideally, our communication should be informative, interesting, consistent, and helpful. **How often do our clients hear from us?**

Our methods of communicating with our customers usually need to include several “touch” points.

On a scale of 1-5, where 1 is poor and 5 is fabulous, assign a number to assess how well we are doing to identify where we can improve.

Which of these, if we improved, would benefit us and our customers the most? Mark that one.

- |   |  |
|---|--|
| <input type="checkbox"/> <b>Emails</b>                                    | <input type="checkbox"/> <b>Phone calls</b>    |
| <input type="checkbox"/> <b>Newsletters</b>                               | <input type="checkbox"/> <b>Advertisements</b> |
| <input type="checkbox"/> <b>Flyers</b>                                    | <input type="checkbox"/> <b>Mailers</b>        |
| <input type="checkbox"/> <b>Face-to-face meetings</b>                     |  |
| <input type="checkbox"/> <b>Meals/Entertainment</b>                       |  |
| <input type="checkbox"/> <b>Video conferencing, such as Zoom or Skype</b> |  |
| <input type="checkbox"/> <b>Other</b> _____                               |  |

### Prioritize

If you had an extra \$10,000 to spend on marketing, where would you spend it?

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# September

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
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This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to streamline this process:

\_\_\_\_\_  
\_\_\_\_\_

This month I am going to complete this project:

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This month I am going to resolve this situation:

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I will contact these 3 people for advice:

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I will reach out to these 3 potential decision-makers/clients:

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On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
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# 5-MINUTE PROBLEM-SOLVING PLAN

Discerning the true nature of an actual problem is a challenge. Leaders need to consider all possible courses of action, and the consequences of each action, both intentional and unintentional. We have all known people who rush into a situation and the unintended consequences are worse than the original problem. Part of the leader's job is to discover the true nature of a problem so that they can make the best possible decision, at that time, with the information available.

## Leaders need to ask questions, such as:

How did this problem start?

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How long has this situation been going on?

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When did this problem get to this level?

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What is the background of this problem?

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Are there any personalities involved that have prevented us from solving this problem in the past?

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What do you think is the single most important thing I need to know to make a good decision? (*ask several people this question*)

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Is waiting for more information a better or a worse option?

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What are the unintended consequences we need to consider?

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What is the simplest and cheapest solution in the short-run?

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What is the simplest and cheapest solution in the long-run?

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What is the most complicated and expensive solution in the short-run?

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What is the most complicated and expensive solution in the long-run?

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What action should we take right now?

1. 

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2. 

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3. 

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4. 

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5. 

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6. 

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# October

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I want to do less of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I resolve to delegate/outsource:

\_\_\_\_\_  
\_\_\_\_\_

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\_\_\_\_\_  
\_\_\_\_\_

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\_\_\_\_\_

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On a scale of 1 through 5, this month was a

5	4	3	2	1
Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

I am grateful for:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

This month I learned:

1. \_\_\_\_\_
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# 5-MINUTE PRODUCTIVITY PLAN

Most people are not as productive as they could be because they waste time, do jobs inefficiently, or procrastinate on projects so that they fall behind and feel overwhelmed. Being productive means maximizing scarce resources, accomplishing what we want to accomplish, and spending time doing what we value.

## Take Control

What are my top three outstanding projects right now? My life would be better if these projects were finished:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Do I need help to get these done?  Yes  No

Do I want help to get these done?  Yes  No

If I had help, would they get done faster?  Yes  No

**Who can I ask for help?**

\_\_\_\_\_

## SDS

To be more effective at the important things, stop doing the things that don't matter.

**(SDS = Stop Doing Stupid)**

**What are three things I do on a daily basis that take up time that I do not need to do?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Time Vampires

We all have people, events, and the unexpected crisis that take up our time. Sometimes other people impose their timelines into our lives and they waste our time, throwing us off schedule or not completing their part of a project that impact us.

**Identify who or what waste our time:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Nice Ways To Stop Interruptions

I'm on deadline.

Can we please catch up later?

Thanks for stopping by. Good talking with you.

**What works for me is:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Do What We Do Best

We tend to gravitate toward those jobs that we like or are good at. ASK: Am I the best person to do this? Can someone else do it better or at a lower opportunity cost? If yes, consider outsourcing, or trade tasks with someone else.

**I can outsource or trade:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## 5-Minute Jobs

What can I get done today that will take less than 5 minutes? Return a call, walk the dog, do some pushups, send a card, post on social media, clear the desk, empty the trash, etc.

**Quick tasks that will decrease my stress and increase my productivity:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# November

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
2. \_\_\_\_\_
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This month I want to do less of these activities:

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This month I resolve to delegate/outsource:

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\_\_\_\_\_

This month I am going to streamline this process:

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\_\_\_\_\_

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

I am grateful for:

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

This month I learned:

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# 5-MINUTE VALUES PLAN

We only get one chance at this life, so let's make the most of it by doing what we were put here to do. Knowing what we're good at, understanding our strengths and challenges, and working steadily toward our goals keeps us from wasting days, weeks, or even years being distracted by things that don't matter. We don't have time to do everything, so we have to focus on what's most important and make choices that support our values.

## It's important to understand what we value.

What's important to me? Examples might include: family, friends, dating, dog, cat, faith, career, money, sports, music, travel, or hobbies.

### My top 5 priorities are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## Many people are good at many things. What are you BEST at?

### What am I naturally good at doing?

(If this question is difficult, ask friends what they see.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## What are my top personality characteristics?

These are different from skills. These are adjectives friends would use to describe you—e.g. inquisitive, generous, energetic, friendly, passionate, kind, etc.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## What can I do to improve my skills?

Education, a degree, an internship, mentoring, coaching, job training?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## What is my life's purpose?

### Try to answer "I am here to"...

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## What obstacles do I need to overcome or be aware of?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## What blogs, books, articles, periodicals, help guide and motivate me?

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## Who are my trusted advisors? Who can I call on for help and advice?

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## What habits/behaviors can I try to eliminate in order to be more likeable?

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To be accountable for changing these behaviors I can:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



# December

## BUSINESS SUCCESS AND ACCOUNTABILITY

Goals for the month:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

This month I want to do more of these activities:

1. \_\_\_\_\_
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Fabulous	Good	Okay	Meh	Terrible

What could have made this month better?

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2. \_\_\_\_\_  
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I am grateful for:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
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This month I learned:

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# 5-MINUTE YEAR-IN-REVIEW PLAN

Assessing the past year helps us plan for the future. Now is a great time to finish old business so we can move forward. As we move into a new year, acknowledge past accomplishments as well as challenges.

In 3 words, describe business in the past year. \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.

In 3 words, describe my personal life/health in the past year. \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.

In 3 words, describe my personal relationships in the past year. \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.

Describe 3 things I worried about last year that I don't need to consider this year.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What was the best decision I made last year?

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---

What helped make me successful?

---

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What was my biggest accomplishment last year?

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What 3 people can I thank for helping me last year?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What unfinished business is still left from last year?

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What was the low point of last year?

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What can I do to avoid that in the future?

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Who can I work with/ask for help/mentor this next year?

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What is my top goal for the next year?

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What three top actions can I take to make that goal a reality?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Contact Mary Kelly

719-357-7360 (office)  
443-995-8663 (cell)

[mary@productiveleaders.com](mailto:mary@productiveleaders.com)

Mary C. Kelly  
Productive Leaders  
4823 Ridgeside Drive  
Dallas, TX 75244

## Connect with Us on Social Media

Facebook: <http://www.facebook.com/DrMaryKelly>

Twitter: <https://twitter.com/marykellyspeaks>

Pinterest: <https://www.pinterest.com/maryaloha/>

YouTube: <https://www.youtube.com/user/productiveleaders>

LinkedIn: <https://www.linkedin.com/in/drmmarykelly/>