

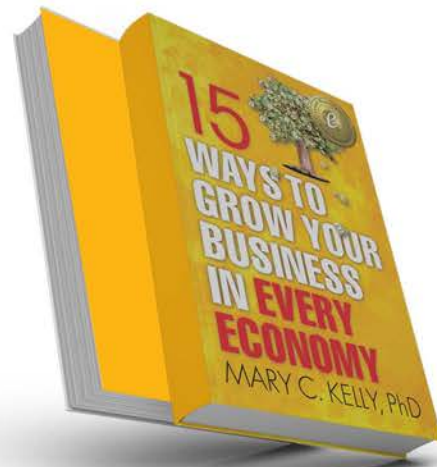
# 12 months of BUSINESS GROWTH RESOURCES

From Mary Kelly



- **STRATEGIC PLANNING**
- **TACTICAL ACTION STEPS**
- **PRODUCTIVITY TOOLS**

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



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# BUSINESS SUCCESS AND MASTERMIND 2021

## JANUARY

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 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. \_\_\_\_\_

# BUSINESS SUCCESS AND MASTERMIND 2021

## February

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 5-MINUTE BUSINESS PLAN

Fill in the blanks/complete the sentences on this page to create a high-level business plan you can use right away.

## 1. The Big Picture/The Executive Summary

This identifies what we actually do and for whom.

**We sell/provide** \_\_\_\_\_  
**to people who** \_\_\_\_\_

## 2. Making Life Better/Business Operations

In business we generally focus on filling a need, solving a problem, or improving someone's life somehow.

**We are helping** \_\_\_\_\_

**We are increasing** \_\_\_\_\_

**We are reducing or getting rid of** \_\_\_\_\_

## 3. Profits/Financials

To be successful in business we have to make a profit. Making a profit means revenues are greater than expenses.

**I charge** \_\_\_\_\_

**To get paid I** \_\_\_\_\_

**I can also earn money if I** \_\_\_\_\_

## 4. Almost Famous/Marketing

People need to know about us and our products or services.

**Customers learn about us through** \_\_\_\_\_

**Our social media plan includes** \_\_\_\_\_

**We manage referrals by** \_\_\_\_\_

## 5. Climbing the Mountain/Management

You cannot do everything by ourselves. Outsource tasks or projects that can be accomplished easily by someone else.

**I like doing** \_\_\_\_\_

**I'll get help with** \_\_\_\_\_

## 6. Top of the World/Success

Know when we achieve goals. Celebrate milestones and accomplishments.

**I'll know I'm successful when I have** \_\_\_\_\_ (#)  
**customers, or sell** \_\_\_\_\_ (#) **products, or make**  
**\$** \_\_\_\_\_ **income.**

# BUSINESS SUCCESS AND MASTERMIND 2021

## March

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 resolve to delegate

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This month I resolve to 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:

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







# 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?**

---

---

---

**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?**

---

**In 10 years?**

---

**In 20 years?**

---

**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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# BUSINESS SUCCESS AND MASTERMIND 2021

## April

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 resolve to delegate

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This month I resolve to outsource

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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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 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?

---

---

What is the craziest impossible idea for this situation?

---

---

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

---

---

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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# BUSINESS SUCCESS AND MASTERMIND 2021

## May

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 resolve to delegate

\_\_\_\_\_

This month I resolve to outsource

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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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 5-MINUTE GOAL SETTING PLAN

Many people don't achieve their full potential because they don't define and work toward goals. When writing a goal, start with "I will" and assign a date for completion.

**My Goal!** \_\_\_\_\_ **Completion Date:** \_\_\_\_\_

**I will:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Obstacles

Goals are challenging for everyone, because everyone has obstacles. What are the obstacles? What are the solutions?

Obstacles	Solutions
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

## Action Steps

What are 5 actions steps to make this goal a reality?

Action	Due Date	✓
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

**I will know I'm successful when...**

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



# BUSINESS SUCCESS AND MASTERMIND 2021

## June

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 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:**

---

---

**They want/like:**

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---

**We find them by:**

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---

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

---

---

**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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# BUSINESS SUCCESS AND MASTERMIND 2021

## July

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

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

- 1 Terrible 2 Meh 3 Okay 4 Good 5 Fabulous

What could have made this month better?

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

I am grateful for:

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

NOTES:

Lined area for taking notes, consisting of 15 horizontal lines.



# 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?

---

---

---

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

---

---

---

### 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. \_\_\_\_\_

# BUSINESS SUCCESS AND MASTERMIND 2021

## August

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

I will contact these 3 people for advice:

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







# 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!

# BUSINESS SUCCESS AND MASTERMIND 2021

## September

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 5-MINUTE EXECUTIVE COACHING PLAN

We believe that everyone can be an even better leader, manager, and mentor. Just like a professional athlete, having coach or advisor helps us all become better. We can talk through ideas, brainstorm, and discuss the best ways to solve problems.

The coach or advisor provides helpful feedback, acts as a sounding board, and gives directive guidance when appropriate. To help others, we provide this checklist we find effective when thinking about establishing a coaching program.

## When pairing a coach with a leader, we ask:

- What would be a good result or outcome?
- How will we measure success?
- Is the coach a good personality fit for this leader?
- Is there mutual respect between the advisor and the organization?
- Does the executive coach or advisor understand the business and the business model?
- Is there an understanding of that organization's desired result?
- What kind of confidentiality is involved?

## During the first meeting between the coach and leader:

- Identify the purpose of the coaching
- Identify the frequency and the means of communication
- Be clear on the tools used to measure and achieve results
- Share commonalities that create trust
- Address uncertainties
- Reiterate the vision, mission, and goals

## Throughout the process:

- Maintain frequent communication, even if it is short phone calls, texts, or emails
- Set and revise the agenda for long-term results
- Have honest dialogues
- Identify behaviors that may need altering with positive action steps
- Continuously assess current issues and business challenges

## For me to work with a coach or executive advisor I need:

Someone who is \_\_\_\_\_  
will push me to \_\_\_\_\_  
and helps me to work through \_\_\_\_\_

# BUSINESS SUCCESS AND MASTERMIND 2021

## October

Goals for the month:

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

This month I want to do more of these activities:

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

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This month I resolve to outsource

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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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 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. \_\_\_\_\_

# BUSINESS SUCCESS AND MASTERMIND 2021

## November

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

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

1	2	3	4	5
Terrible	Meh	Okay	Good	Fabulous

What could have made this month better?

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

I am grateful for:

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

NOTES:

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# 5-MINUTE GRATITUDE PLAN

We know that people who reflect on gratitude are happier, feel valued, and experience fewer health issues. How can we live a more grateful life?

People who give to others, those who “pay it forward” show a greater neural sensitivity in the medial prefrontal cortex, the part of the brain associated with learning and decision making.

- use positive emotional words
- use the word “we” more than “I”

Day \_\_\_\_\_

Date \_\_\_\_\_

On a scale of 1-10, today was \_\_\_\_\_

### 3 things that went well for me today.

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

### What did I accomplish today?

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

### What could have made today better?

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

### Five people I appreciated today.

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

### I worried about this today

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

### I didn't need to worry about

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



# BUSINESS SUCCESS AND MASTERMIND 2021

## December

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 resolve to delegate

\_\_\_\_\_

This month I resolve to 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

\_\_\_\_\_

I will contact these 3 people for advice:

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





# 5-MINUTE FOLLOW-UP PLAN

We need to stay in touch with people we currently do business with, those we've done business with in the past, and those we hope to do business with in the future. If you've ever come home from a networking event or conference with a pile of business cards and then done nothing with them, this may help.

## Important keys to effective follow-up

- Whatever outreach you decide to do, remember that most people need several touch points before they think seriously about working with you.
- When you follow up, make sure the correspondence is about *them*—not you!
- Show a genuine interest in being helpful.

## Great ways to follow up

Follow up with people you want to stay in touch with by:

- 1. Mailing a handwritten note** (and include your business card).
- 2. Sending a note using a service** like SendOutCards.
- 3. Forwarding an article or video** that may be of business interest to them.
- 4. Ordering a business-oriented book** they may appreciate, and letting them know to expect a package in the mail.
- 5. Connecting with them on LinkedIn or other social platforms.** Include a brief but friendly note that reminds them of something you discussed when you met.

**6. Asking them if you can add them to your outreach initiative list or CRM.** (It's important to ask permission for this, as automatically adding people to your mailing list is considered spam.)

**7. Finding someone you both know, and starting an online conversation** with the three of you.

**8. Discovering common interests, and sending a message highlighting that commonality:**

"Sam, I think we were in Minnesota at the same time—you were at U of M, while I was at 3M!"

**9. Calling** to say it was nice to meet them. (Yes—actually using the phone!)

**10. Sending a short video.**

**11. Sending a short voice memo** attached to an email with a followup to your conversation.

**12. Sending a link for helpful resource material,** and then following up with a note asking if they were able to access the materials.

**13. Offering a short discovery conversation or consultation** to offer a taste of your work or services.

**14. Inviting them for coffee** to get to know each other's work further.

**15. Initiating a video conference virtual "coffee" or happy hour** to catchup.



# 5-MINUTE PLAN-OF-THE-DAY PLAN

**DAY:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

## Today's Focus

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## Reminders

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

## Errands

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

## Notes

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## Appointments/Schedule

6:00a \_\_\_\_\_

7:00a \_\_\_\_\_

8:00a \_\_\_\_\_

9:00a \_\_\_\_\_

10:00a \_\_\_\_\_

11:00a \_\_\_\_\_

12:00p \_\_\_\_\_

1:00p \_\_\_\_\_

2:00p \_\_\_\_\_

3:00p \_\_\_\_\_

4:00p \_\_\_\_\_

5:00p \_\_\_\_\_

6:00p \_\_\_\_\_

7:00p \_\_\_\_\_

8:00p \_\_\_\_\_



# 5-MINUTE

## WEEKLY PRODUCTIVITY PLAN

**WEEK STARTING:** \_\_\_\_\_

<input checked="" type="checkbox"/>	Action Plan	Time in Minutes	Due Date	Priority
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