

Strategic Planning

When working on strategic planning we want you to assess based on the FEE test (Financial, Environmental, Emotional) as a way to cover all bases and get clear on what's been working, what hasn't been working and what you would like to start, stop and continue. This will be your foundation for mapping out the actions you're going to take in order to reach your goals. Strategic planning is not only about planning out your goals but also about helping you make decisions as you navigate through the inevitable changes that you will face over the year.

Notes:

Use the line below to chart how you felt last year along with what was happening financially and environmentally during those times.

JAN

DEC

FINANCIAL

What worked

What didn't work

ENVIRONMENTAL

What worked

What didn't work

EMOTIONAL

What worked

What didn't work

Here we're going to explore some of the things we tell ourselves that become excuses that allow us to stay stuck. As you go through this exercise, ask yourself "what excuses am I using to explain why I don't have what I wish I had?"

FINANCIAL

ENVIRONMENTAL

EMOTIONAL

FINANCIAL

Examples

- Other people had ___ that I didn't have.
- That person got in early... it was easier for them.
- I can't find the time.
- I'm too busy.
- No one else can do ___ except me.
- People who make a lot of money are bad, people who are good don't make a lot of money.
- It is what it is.
- I have to do ___ because _____.
- I'm scared that if I'm successful I won't want to be committed to this ___ for the rest of my life.
- I'm multi-passionate, so I can't niche.

Here we're going to assess what it is that you would like to stop, start and continue within the three areas we're looking at, Financial, Environmental and Emotional.

Jot down here if you have any high level financial goals like revenue goals or where you would like your revenue to come from...

FINANCIAL

Start	Stop	Continue

ENVIRONMENTAL

Start	Stop	Continue

EMOTIONAL

Start	Stop	Continue

We're going to start with jotting down all the things you'd like to accomplish over the next year and then break them down by categories to understand what's needed, then spread out the change.

What are all the things you would like to make happen this year?

CLARITY

What do you need to understand better in order to make it happen?

BUILD

What do you feel clear about that needs to be built or put into place?

OPTIMIZE

What do you have that's not working or that you'd like to make work better?

Time to spread out the change: Take all the things you decided on above and spread them out over the year so that you're not trying to change everything all at once. You may want to share this with your mastermind to get feedback on what is realistic to accomplish in the time you've laid out.

Q1

Q2

Q3

Q4

Shifting from outcome focus to goals/action focus allows us to stop placing our success on an external factor that we can't control. When we make the goal be the actions we will need to do to get to the outcome we desire, we have a clear path to creating what we want.

WHAT ARE THE OUTCOMES THAT YOU WANT?

Here you can start to brainstorm some of the actions that you can be taking to lead to the outcomes you desire which you can then map out in your daily focus board when you implement it in ClickUp.

WHAT ARE SOME OF THE ACTIONS/HABITS THAT WOULD HELP YOU CREATE THE OUTCOMES YOU WANT TO CREATE?

WORD OF THE YEAR OPTIONS

OFFICIAL WORD OF THE YEAR

HOW WILL THIS WORD HELP YOU MAKE YES/NO DECISIONS?

Now it's time to take your plan and put it in ClickUp. Make sure you rewatch the trainings and then get to work on putting it all into plan in ClickUp.

PUT IT ALL INTO ACTION

MAKE THE PLAN OFFICIAL: TRAINING TO HELP YOU MAP OUT YOUR STRATEGIC PLAN IN CLICKUP - [CLICK HERE](#)

QUARTERLY ASSESSMENT: YOUR GUIDE TO MAKING SURE YOU'RE STAYING ON TRACK - [CLICK HERE](#)

STRATEGIC PLANNING CLICKUP BOARD TEMPLATE - [CLICK HERE](#)

DAILY FOCUS BOARD TRAINING: TRAINING TO HELP YOU MAP OUT THE ACTIONS THAT ARE GOING TO KEEP YOU MOVING TOWARDS YOUR GOALS - [CLICK HERE](#)

DAILY FOCUS CLICKUP BOARD TEMPLATE - [CLICK HERE](#)