

## **2021 Annual Planning Checklist**

1. ☐ "Complete" previous years' accomplishments and goals.
  - a. What did you achieve that you set out to achieve?
  - b. What did not get accomplished that you wanted to?
    - i. Identify the breakdowns or barriers that led to you not achieving it. Let them go mentally, emotionally, etc. Declare that item complete.
  - c. Compile a list of at least 100 items that you are grateful for. This puts you in a vibrational state of being for thinking about and planning next year's goals.
2. ☐ Declare the previous year complete!
  - a. This means you have really let everything go and you are not dragging anything from the previous year into the creation of your new year.
  - b. Have a celebration plan or event and schedule it so that it happens.
3. ☐ Annual Personal Planning and Goal Setting
  - a. Set Personal Goals in the areas of (*Finance, Health & Fitness, Relationships, Travel, Education & Learning, etc.*)
  - b. Plan, schedule vacations & time off.
4. ☐ Annual Business Planning
  - a. Set Business Goals
    - i. 3 large juicy goals that can be achieved in 2021 with all the other goals being milestone goals to those larger goals.
    - ii. One goal must always be your strategic annual Revenue/Client Goal also broken into 12 monthly revenue milestone goals.
  - b. Define exactly what you need to sell and how much of it in order to achieve your Revenue Goal.
5. ☐ What is your "Context" or "Story" for the year?
  - a. Imagine, then describe your context or story that will connect to your mind's powerful emotional centers and will shape your year.
  - b. Boil this down into 3 words or phrases, then keep these present and obvious so that you can remember and stay conscious of them as you proceed through your year.
6. ☐ What are your "Motivations" for your goals?
  - a. Write out WHY you want those goals – personal and business. Be very specific and clear as you do this.

- b. Your why's, motivations and purpose must emotionally engage you. It should really ignite your emotional and feeling centers as well. Personal motivation is a critical part of achieving any goal.
- 7. ☐ Set up your Personal Budget for the year. This is the "Funding Plan" for your life.
  - a. Make sure you are putting money away for vacations.
  - b. Make sure you are putting money away in personal savings, retirement savings, investment savings and other containers or buckets for use later even if it's just \$10 a month.
- 8. ☐ Set up your Business Budget for the year
  - a. Make sure your salary/distributions are enough to cover your new personal budget.
  - b. Make sure you have a Taxes category in your budget.
  - c. Make sure you have Business Savings and Profit built into your budget to ensure you are building reserves.
  - d. Follow the principle of "pay yourself first."
- 9. ☐ Fill out a Timeline for the year. This will include...
  - a. Your Revenue Goal broken down by month so you can see each revenue stream and how many units of each revenue stream you will need to sell.
  - b. Milestones for your other goals (business & personal).
  - c. Any other notes that you need to have your eye on regarding things that will, or need to happen during the year.
  - d. A timeline is a document where by you can organize your goals and actions into specific time chunks such as months, weeks, quarters.
- 10. ☐ Create a Vision Board that contains pictures that represent your goals and/or motivators and other areas of focus you have for your life (*Business Life and Personal Life*).
- 11. ☐ Set Schedule for the year in a master calendar: (if it is important to you, it should be in your schedule, otherwise question its importance.)
  - a. Schedule all time off.
  - b. Schedule all birthdays, special events.
  - c. Schedule off holidays.
  - d. Set work and production schedule.
  - e. Set all standing business meetings (staff, etc.)
  - f. Ensure personal events and important focuses so that your schedule has balance to it.
- 12. ☐ Set and schedule all meetings with staff.
  - a. Get agreement on company goals
  - b. Set goals for each department of your company if you have a larger staff.