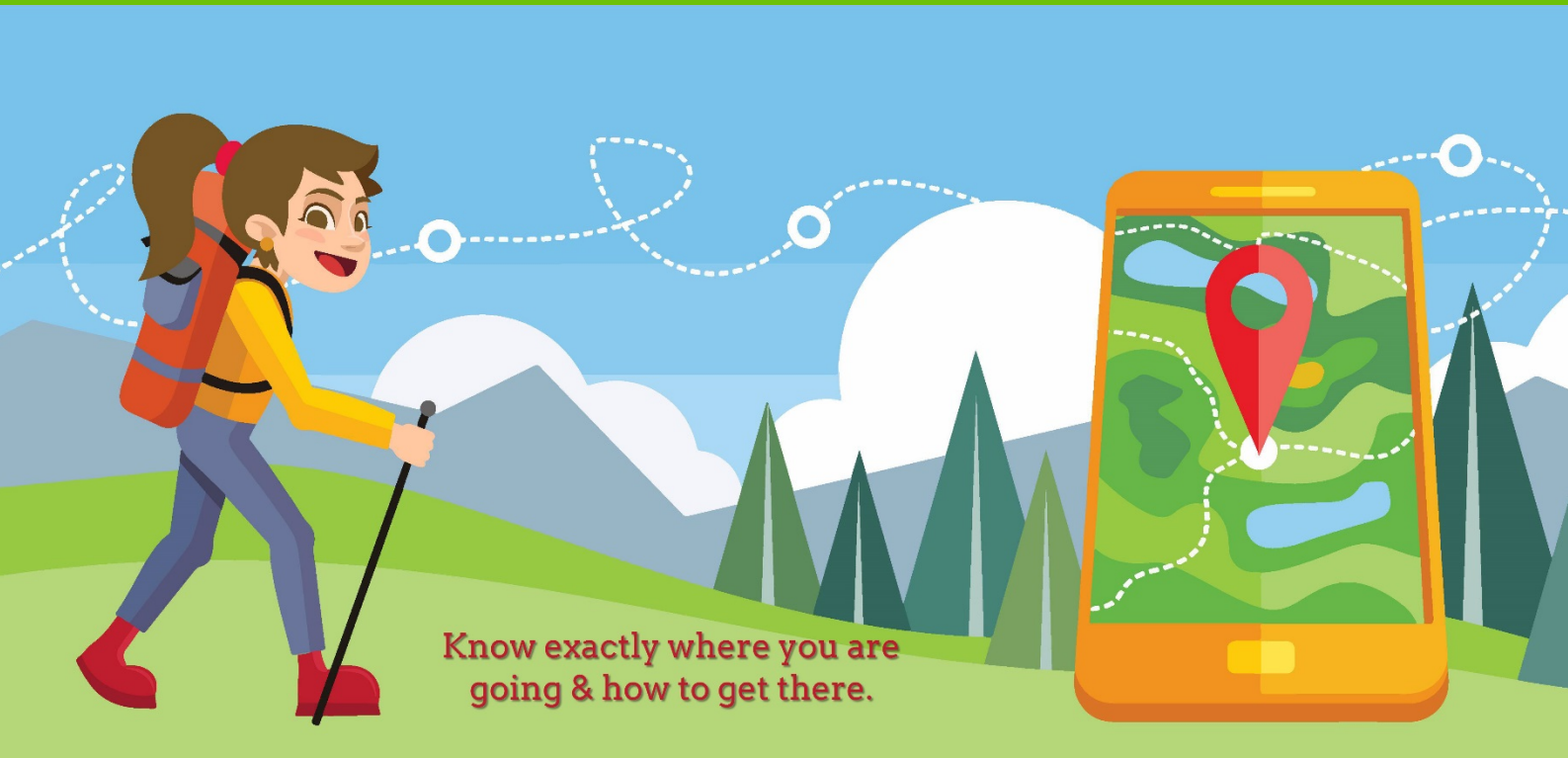


CREATING 2020

Worksheets & Materials



Know exactly where you are
going & how to get there.

*Powerfully Prepare For The Most Successful Year of
Your Business and Life.*

**A Live & On-Demand Two-Part Master
Class For Planning Your Company's 2020
Strategic Business Growth & Initiatives**

*Renae Bechthold
Metro Health & Wellness*

Part 1 – Complete – Clear – Celebrate



By having a simple set of specific goals with a plan to reach those goals, documented onto paper, you'd make it **ten times easier on yourself** to turn your business into a success – that means, profitable, stable, sustainable.

Yet, when given the opportunity to learn and do this very, very simple task... most people don't take the opportunity. They procrastinate. They use the pervasive excuse to stay stuck, struggling or broke: "I don't want to spend the money to learn how to do this nor the time do actually do this"

The only thing I can figure is that these professionals are terrified of being successful... they don't believe they can be. They don't believe it can be that simple. And THAT's the pitfall.

They don't believe they can. They don't believe they deserve to. I truly hope this is NOT you.

When you take the time to do this and get the proper guidance to do it right, you will be **ASTOUNDED** at what your year will bring you. The webinar you are about to do is going to have you creating that kind of powerful plan.

You'll first start by completing the previous months that led to now. If you are doing this process at the end of this calendar year, good. You will be completing your entire year starting with last January

So what do I mean by “complete or completing”. It’s a special term we use and it has a particular distinction in the context of this training. We’ll explain inside.

After establishing a clear space and a clean pallet to work from, you will then begin the process of creating your strategic plan for the year. This entire process is pretty data heavy. In other words get your keyboard and or pens and pencils ready – pull out the crayons and paper and calculator and get ready to crunch numbers and write out procedures and actions steps.

Part 1 – Complete – Clear – Celebrate

When setting up the conditions for a powerful, productive and successful year, it is important to have a clean, fresh platform to work from – a clean sheet of paper – a clean canvas – choose your metaphor. Anything holding over from your past year (or more), particularly in your mental or emotional field, can slow you down and can cause you to build your new year on a weak foundation.

That is why Part 1 of this process exists. It trains you how to complete things, how to clear unnecessary baggage and energy out of your space, how to create a fresh, brand new space to create from — even if you didn't quite achieve what you wanted to achieve this year. If you started a garden in the spring, but never prepared the soil to receive fresh seeds; if you left in all of the dead plants and weeds from last year's planting, how productive and lush of a garden would you have next year?

Part 1 is a very powerful process that you can use in every part of your life to masterfully prepare the "soil" for whatever you set out to do in life. We want to ensure that you have let go of -- i.e. "pulled the weeds" of any mental or emotional clutter, regrets, resentments, frustrations, expectations, opinions, judgments, etc. of anything that happened or didn't happen this year. We want you to start out 2020 with a neutral context, and at best, standing on the accomplishments you achieved this year.

You're now going to prepare to create a powerful space and environment so that you can set up your next business year to be your BEST year regardless of what happened or is still happening this year.

Please have **Section 1, Section 2 and Section 3** of Part 1 of this preparation document complete and printed out in front of you before Session 1 of **Creating 2020 for the live or video session**.

Section 1 - Fill out before start of session 1 or prior to listening to the first video session.

What was your gross revenue for 2019? \$ _____

(or best estimate of what it will be by the time you complete your year.)

Did you make as much as you would have liked? ☐ Yes ☐ No

Comments: Anything you would like to say about that?

Part 1 – Complete – Clear – Celebrate

Section 2 - Fill out before start of session 1

Make a list of the things that has you the proudest of yourself that you did accomplish this year — personally or professional.

[illegible]

Which one makes you the proudest of all and why?

Part 1 – Complete – Clear – Celebrate

Section 3 - Fill out before start of session 1

What is a list of the things that did not achieve but wish you had?

Which one are you most bummed, upset or frustrated about?

Section 4 - Fill out during session 1

CELEBRATION PLAN

I WILL CELEBRATE MY YEAR AND WINS BY...	Date:

Radical Gratitude

Section 5 - Do after session 1

Write a list of the things/people/events/items/beings you are grateful for or you can acknowledge yourself for from 2019. Please complete this before you do any work on Part 2 (session 2) of this training. Try to be specific as possible. Ex: Rather than writing “clients” or “customers” in general, write down specific names.

[illegible]

Part 2 – Creating Your Year Powerfully

Section 1a – To get the most from this training, work on the items highlighted in yellow BEFORE session 2.

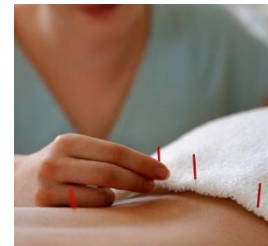
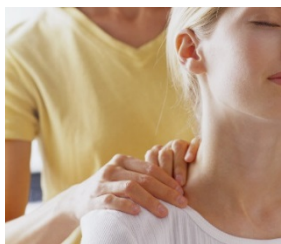
1. What are you offering or selling?

RECOMMEND:

Purchase or download a 2020 calendar to be used as a master planning calendar for your year.

<http://www.calendarlabs.com/> Be sure they are large enough to plan with, i.e., 1 month per sheet of paper.

See Links at end of this Workbook.



Part 2 – Creating Your Year Powerfully

Section 1b – To get the most from this training, work on the items highlighted in yellow BEFORE session 2.

What would be your projected revenue if you did nothing different than you did in 2019? \$ _____

Is it enough? ☐ Yes it's enough ☐ No it's not enough

What would you like it to be? \$ _____

What would you like your personal take-home pay to be? _____

Does these numbers feel slightly uncomfortable, like a stretch? Or, are you playing small? Is it “pie-in-the-sky” or unrealistic given your current capacity, resources, training or skill set?

2. How much money – revenue - will you generate in 2020 from selling the services or products on your from page 7?



Part 2 – Creating Your Year Powerfully

YOUR CONTEXT FOR THE YEAR

Your mindset will determine 80 to 90 percent of your results. Which is why we need to spend time considering and being aware of our own thoughts, beliefs and patterns. If you – NO KIDDING – truly desire and are committed to achieving your financial and other goals, then an empowered positive, mindset will need to be an important piece to your planning.

Section 2 - Exercise worksheet for use during Part 2 live training or video

Part 2 – Creating Your Year Powerfully

Section 2 –

Why? What is your motivation for reaching your goals?

Be as specific as you can. Identify things that truly emotionally engage you. (“Save for Retirement” or “Pay off debt” is not specific enough. List exactly how much \$\$ you would like to flow into your retirement savings account or how much you will flow towards paying down your debts if you were achieving your financial income goals.) Some areas to look at for these motivations could be: Finances, Health, Relationships, Children, Education, Fun, Entertainment, Travel, Vacation, Spiritual, Personal Development, Physical items such as car, home, clothing, toys, etc.





Part 2 – Creating Your Year Powerfully

Section 4 –

List the Top Accomplishments/Achievements/Goals you want for 2020

Looking into the future, imagine you are sitting at December 31st 2020 ... what have you achieved? What would you like to list as your top accomplishments – **business** and **personal**... what are you most proud to have accomplished next year? If you own a business your annual financial goal should be on this list. Be sure to include some personal goals as well. Look at major areas of your life such as Health, Relationship, Children, Education, Exercise, Home or home improvements, Fun, Entertainment, Travel, Vacation, Spiritual, Personal Development, etc.

FIRST THINGS FIRST

What is the distinction or condition of **BALANCE** to you? What does it mean to you?
What does it look like in your life?

Using a Master Calendar, mark off the dates for your Vacation, Conferences, Seminars and any other time off NOW before determining any other priorities.

2020 Calendar

January 2020						
W	S	M	T	W	T	F S
1			1	2	3	4
2	5	6	7	8	9	10 11
3	12	13	14	15	16	17 18
4	19	20	21	22	23	24 25
5	26	27	28	29	30	31

01: New Year's Day
20: Martin Luther King Day

February 2020						
W	S	M	T	W	T	F S
5						1
6	2	3	4	5	6	7 8
7	9	10	11	12	13	14 15
8	16	17	18	19	20	21 22
9	23	24	25	26	27	28 29

17: Presidents Day

March 2020						
W	S	M	T	W	T	F S
10	1	2	3	4	5	6 7
11	8	9	10	11	12	13 14
12	15	16	17	18	19	20 21
13	22	23	24	25	26	27 28
14	29	30	31			

April 2020						
W	S	M	T	W	T	F S
14				1	2	3 4
15	5	6	7	8	9	10 11
16	12	13	14	15	16	17 18
17	19	20	21	22	23	24 25
18	26	27	28	29	30	

May 2020						
W	S	M	T	W	T	F S
18						1 2
19	3	4	5	6	7	8 9
20	10	11	12	13	14	15 16
21	17	18	19	20	21	22 23
22	24	25	26	27	28	29 30
23	31					

25: Memorial Day

June 2020						
W	S	M	T	W	T	F S
23		1	2	3	4	5 6
24	7	8	9	10	11	12 13
25	14	15	16	17	18	19 20
26	21	22	23	24	25	26 27
27	28	29	30			

July 2020						
W	S	M	T	W	T	F S
27				1	2	3 4
28	5	6	7	8	9	10 11
29	12	13	14	15	16	17 18
30	19	20	21	22	23	24 25
31	26	27	28	29	30	31

04: Independence Day

August 2020						
W	S	M	T	W	T	F S
31						1
32	2	3	4	5	6	7 8
33	9	10	11	12	13	14 15
34	16	17	18	19	20	21 22
35	23	24	25	26	27	28 29
36	30	31				

September 2020						
W	S	M	T	W	T	F S
36			1	2	3	4 5
37	6	7	8	9	10	11 12
38	13	14	15	16	17	18 19
39	20	21	22	23	24	25 26
40	27	28	29	30		

07: Labor Day

October 2020						
W	S	M	T	W	T	F S
40					1	2 3
41	4	5	6	7	8	9 10
42	11	12	13	14	15	16 17
43	18	19	20	21	22	23 24
44	25	26	27	28	29	30 31

12: Columbus Day

November 2020						
W	S	M	T	W	T	F S
45	1	2	3	4	5	6 7
46	8	9	10	11	12	13 14
47	15	16	17	18	19	20 21
48	22	23	24	25	26	27 28
49	29	30				

11: Veterans' Day
26: Thanksgiving

December 2020						
W	S	M	T	W	T	F S
49			1	2	3	4 5
50	6	7	8	9	10	11 12
51	13	14	15	16	17	18 19
52	20	21	22	23	24	25 26
53	27	28	29	30	31	

25: Christmas Day

www.blank-calendar.com

Preparation Tasks for Creating 2020

What you identify here may need to be listed on your timeline as supporting elements for achieving your goals.

- ☐ Do your goals require additional actions, or people resources such as •staff, •bookkeepers, •website development, •financial advisors, •attorneys, etc.? Do they require locations, events, additional skills or education to enable you to reach those goals? If yes, list what they are.



- ☐ Do your goals require any research, purchases or investments you will need to make? If so, what is it or are they?



Preparation Tasks for Creating 2020

What you identify here may need to be listed on your timeline as supporting elements for achieving your goals.

- ☐ Do your goals require any marketing or sales actions or processes in order to be achieved? If yes, list what they will be or need to be.



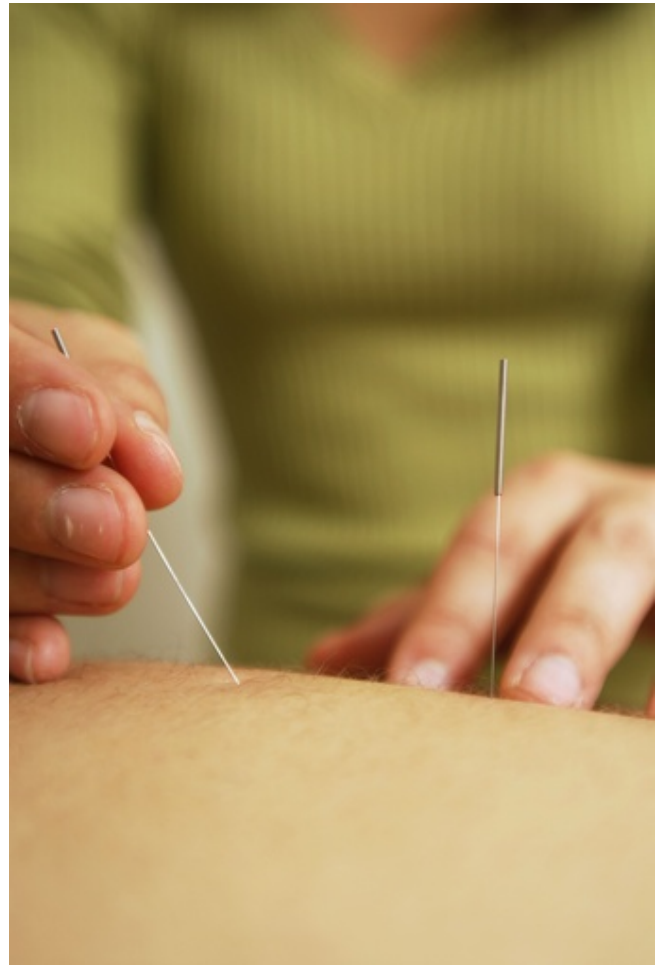
- ☐ Don't forget to make adjustments to your budget for the new year. What needs to increase or decrease in your financial budget for income, savings and expenses?



Preparation Tasks for Creating 2020

What you identify here may need to be listed on your timeline as supporting elements for achieving your goals.

- ☐ How much time per week or month needs to be devoted to any of the previous items you identified?



- ☐ Is there space or capacity in your schedule? If not how can you create more space in your schedule for these items and actions?

In other words, think about what else needs to happen?

Timeline Worksheet

Timeline Worksheets for session 2: This is just an exercise to walk you through how to timeline a goal. The very best method is to take 1 sheet of 8.5 x 11 inch paper for each month. Write the name of the month on top. Begin to brainstorm all of the known items for your year on each sheet. Your sales goal for that month, Number of units of each revenue you need to sell. Events, marketing actions, vacations, stuff you need to purchase, etc. Use the worksheet above where you identified elements/ingredients that are required in order to support the goal being achieved.

Example: You want to move to larger offices in the fall. You don't start looking for an appropriate space in September. Rather you start doing your research in the spring, engage a realtor by June, determine any additional needs such as tenant improvements, licenses, etc. All of these now known items get listed on your timeline under the appropriate months.

December 2020: \$

November 2020 : \$

October 2020 : \$

September 2020 : \$

August 2020 : \$

Timeline Worksheet (con't)

July 2020 : \$

June 2020 : \$

May 2020 : \$

April 2020 : \$

March 2020 : \$

February 2020 : \$

January 2020 : \$

Financial Timeline and Projection Spreadsheet

Document your Financial Timeline via an easy-to-update calculable spreadsheet that automatically sums your totals for you

Income	January	February	March	April	May	June	July	August	September	October	November	December	Annual
Revenue Streams:													
Monthly Income/Rev (use for just 1 revenue stream)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
1-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
TOTAL (for multiple rev streams)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00
Units*													
Revenue Streams:													
1-	0	0	0	0	0	0	0	0	0	0	0	0	0
2-	0	0	0	0	0	0	0	0	0	0	0	0	0
3-	0	0	0	0	0	0	0	0	0	0	0	0	0
4-	0	0	0	0	0	0	0	0	0	0	0	0	0
5-	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0

You get a Financial Timeline excel template in the set of documents for this training. Download it and then use it to document your final list of revenue streams plus the monthly revenue targets for each stream that will then add up to your Annual Sales Goal.

[2020 Financial Forecast and Monthly Stats Spreadsheet](#)

Final Exercise

Keep goals present and conscious so you can stay committed and intentional

- **V**ision Boards/Collage boards with pictures.
- **T**ype and print your list of goals as well as timeline so that you can read them throughout the year or edit them if necessary.
- **P**ost your goals and time line charts and read them daily – don't keep them hidden in your computer.
- **C**reate short, present-time affirmations and say them daily.
- **D**aily visualize and *feel* the end result as though it existed now.
- **U**se daily verbal language that is in alignment to your goals and to being successful *now*.
- **S**tay strongly emotionally engaged with WHY you have these goals.
- **E**ngage an accountability partner or hire a business coach.
- **A**lign with your Calendar Schedule-ensure your schedule supports your goals.
- **A**lign with your Budgets – make sure you have a budget that supports your goals, actions and desired experiences.

We often need help staying in present time and keeping our goals present and conscious. Structures are the perfect tool to help us to hold our commitments in place.

Here are a few types of structures you can use to keep yourself present and conscious to your goals and what you intend to achieve or experience in 2020?

One Action

What ONE action will you take this next week to get this started and lock in your intention and commitment for achieving these goals?

Complimentary Coaching Call

*Remember to call or email to schedule your 15-minute review call where I will review your plans and give you any coaching or feedback
1-858-689-9777 or info@metromm.com*

Resources

To download, hover cursor and tap or click. Save to device.

[*Annual Planning Checklist Info Graphic*](#)

[*Annual Planning Checklist Outline*](#)

[*Formula To Reach Sales Goal*](#)

[*Monthly Editable Calendar-2020*](#)

[*Quarterly Editable Calendar -2020*](#)

[*Excel Timeline & Tracking Worksheet - 2020*](#)

[*Marketing Calendar Sample Template PDF Marketing*](#)

[*Calendar Blank Template DOC*](#)

[*Getting Complete Worksheet*](#)