



Getting Back to Basics & Laying Business

Building Blocks

*'Straightforward' Business Strategy
Training for Beginners*



3. Making Your Plan

Alignment Checklist – Where are you at now?

Physical:

What do I need to schedule?

Self-care:

What will fill me up more right now?

Mindset:

What will move me in to more of a peak state?

Emotional:

Where do I feel supported?

Where do I desire more support?

What do I need right now?

Spiritual:

Am I connected, present and calm right now?

Am I in alignment with my truth, and vibrating high?

What can I do to improve this?

Relationship:

How can I be better my relationship with:

How can I be better for:

Friends:

Who do I need to reconnect with?

Who can I appreciate more today?

Clients:

Have I checked in with all of my groups/associates?

Have I checked in with all of my clients?

Where can I give a little more this week?

Contribution:

Which of my causes can I contribute to this week?

Who might need my help this week?

How can I create more moments of inspiration?

Workload:

What are my big 3 initiatives for the year?

What are my 3 projects for the quarter?

What are my 3 priorities for today?

What is likely to distract my attention?

How can I prevent distraction?

Team:

Who can I reconnect with?

How can I make feel someone more valued and heard?

What do I need to do to help others make progress?

Growth:

Where can I learn something new/more?

How can I show up as a bigger version of me?

What is going to be the biggest needle mover right now?

What is my first action step?

Actions for Success

It is important when planning in your business that you create structure and format each week and month.

This allows you to clearly map out tasks and keeps you accountable to commit to the steps, and also helps to eliminate confusion and overwhelm.

The steps should be completed within the set time frame (usually one week/month) to keep you on track towards reaching your ultimate goals.

Monthly Goals

	Now	Month 1	Month 2	Month 3	Who/What Do I need?
Leads					
Sessions					
Sales					
Days Off					
Rituals/Rewards					

Weekly Planner

Top 3 Goals for This Week:

1. _____
2. _____
3. _____

Top 3 Daily Tasks:

Monday

1. _____
2. _____
3. _____

Tuesday

1. _____
2. _____
3. _____

Wednesday

1. _____
2. _____
3. _____

Thursday

1. _____
2. _____
3. _____

Friday

1. _____
2. _____
3. _____

Self-Care:

Personal Development:
