



MAKE IT HAPPEN!

*My 3 Month Business
Action Planner!*

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INSTRUCTIONS: It can be hard to plan for the long term, but if we're **clear where we want to be in a year** - and then work on a *simple* plan for our **TOP 3 GOALS in 3 month blocks**, it's much easier to succeed.

- Allow yourself 30 minutes of quiet time to consider these questions that help you bring your business vision into reality.
- Then work through the questions in the order below.



PART 1: Your Goals for 2020

1. What do I want my business to look like 1 year from now?

Consider the areas listed below, and anything else you may already have in mind. You can make these goals SMART (Specific, Measurable, Actionable, Relevant & Timely) if you like - but it's not essential here. The key thing is to write it down.

INCOME: Products & Services

eg. Clients, Workshops, Teleseminars, Events, VIP Days, Signature Program, Products & Other Offerings

MARKETING: Activities and Plans

eg. Marketing Plan, Create or Update Website, Blog, Newsletter, Social Media Goals & Strategies, Physical Business Marketing Materials, Networking, Niche Clarifying, Personal Brand, Advertising

BUSINESS DEVELOPMENT:

eg. Business Relationships & Joint Ventures, Products & Offerings to Develop, Events to Participate in

BUSINESS OPERATIONS:

eg. Business and Financial Plans, Your Business Processes, Office Environment, Organization (orderliness), Business Productivity, Legalities, Insurance, Hiring Help etc

FINANCES:

eg. Financial Plan, Budgeting, Review or Reduce Business Expenses

PERSONAL DEVELOPMENT:

eg. Learning, Training & Development - Coaching Skills and Marketing/Business Growth, Get Experience in..., Your Work-Life Balance!

OTHER:



PART 2: Your "Top 3" Quarterly or 3 Month Goals

2. What do you want to accomplish in your business over the next 3 months?

- Review your 2020 goals from PART 1, and choose your *Top 3 goals* to work with over the next quarter or 3 months.
- TIP: If you have a big annual goal, consider chunking it down and having a quarterly goal to achieve one part of it eg. Create outline/timeline for signature program or Write website homepage copy. Here are some thought-starters:
 1. **Income Goals eg.** How much money do you want to earn? How many clients do you want? Will you coach any groups? What about workshops or teleseminars? What products or services will you sell?
 2. **Marketing Goals eg.** What do you want people to know about you? How will you get the word out eg. updated website, networking, a free workshop to showcase you? How many new newsletter sign-ups or social media followers?
 3. **Business Development, Finances and Operations eg.** What products or services will you create? What new business relationships or joint ventures will you develop? What events will you attend? How will you organize your business eg. get a loan, create a client enrolment process or pre-post Social Media to save time.
 4. **Personal Development, Learning and Lifestyle Goals eg.** What areas of your business do you need to understand more? What coaching skills would you like to grow? How will you have more life balance?

Write below how you want your business to be in 3 months' time, in the **PRESENT** tense. Be **SPECIFIC**.

| Your Key 3 Month Business Goals: End of Quarter Date: _____ | What key tasks or action steps are needed to achieve these goals? | What will help you succeed? What help do you need eg. support from a friend/colleague, new habits, delegating, equipment/tools |
|--|---|--|
| 1. _____ _____ GOAL DEADLINE: _____ | • • • | • • • |
| 2. _____ _____ GOAL DEADLINE: _____ | • • • | • • • |
| 3. _____ _____ GOAL DEADLINE: _____ | • • • | • • • |

3. What Top 3 specific tools, resources and support do you need over the next 3 months to achieve your goals? NOTE: Be sure to choose things you're actually going to use or will do consistently.

1. _____ 2. _____ 3. _____



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PART 3: One Month Action Planning - one week at a time!

- Print three (3) copies of this page, then use one in time to plan each upcoming month of the next quarter.
- Review your 3 Month Goals from Part 2, and choose *just 3 key actions* for each week over the next month.
- Make your tasks Specific and Achievable, and only write tasks down that you are 100% committed to.
- Finally, keep this sheet *visible on your desk*, refer to it often - and when planning your week!

Month _____ **This Month's Focus** _____

Week 1: The TOP 3 steps I will take within the next WEEK that move me closer to my goals are

| | Action | Complete by Date | Delegate to / Support Needed | Complete |
|----|--------|------------------|------------------------------|----------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |

Week 2: The TOP 3 steps I will take WEEK ending _____ that move me closer to my goals:

| | Action | Complete by Date | Delegate to / Support Needed | Complete |
|----|--------|------------------|------------------------------|----------|
| 4. | | | | |
| 5. | | | | |
| 6. | | | | |

Week 3: The TOP 3 steps I will take WEEK ending _____ that move me closer to my goals:

| | Action | Complete by Date | Delegate to / Support Needed | Complete |
|----|--------|------------------|------------------------------|----------|
| 7. | | | | |
| 8. | | | | |
| 9. | | | | |

Week 4: The TOP 3 steps I will take WEEK ending _____ that move me closer to my goals:

| | Action | Complete by Date | Delegate to / Support Needed | Complete |
|-----|--------|------------------|------------------------------|----------|
| 10. | | | | |
| 11. | | | | |
| 12. | | | | |



PART 4 - Wrapping up for Success:

My **THEME** for the next 3 months is: _____

To achieve my goals I need to **BE** someone who is: _____

Self-Sabotage - If I were to get in my own way I would: _____

What is the best advice I could give myself to be sure I achieve my 3 month goals?

Be More Productive! What action will I take to increase my productivity? Eg. delegate, say "no", try something new, ask for help, start a new habit etc. Write something specific you will do below:

Bonus: 5 Great Ideas to Build Your Business!

1. **Create a [Coaching Program](#)** or even a [Signature Program](#) for your target market that meets a specific need. Then create a poster outlining the key highlights of your program and put it up everywhere your target market might see it, as well as emailing it to your contacts and sharing it on social media too!
2. **Start writing a regular newsletter** with articles & tips that help your target market solve their problems and achieve their goals. Include a sign-up form on your website so people can receive your wisdom straight to their inboxes - and be reminded of you each time!
3. **Survey your fans.** Ask them about their biggest problems - and what they would love from you. The "magic wand" question (If you had a magic wand, what would you do?) is a great way to wrap-up your survey before thanking them for their time - and asking them to sign up for your newsletter (if they haven't already). [Survey Monkey](#) is a great free tool for this.
4. **Run a free 45-60 minute coaching workshop**, somewhere your target market hangs out in person. It could be a "brown bag lunch" for employees of a specific company, a store where your target market likes to shop, at a local conference, networking group or something else. [Collect Feedback](#) afterwards - ensuring you ask for contact details and permission to send them your newsletter!
5. **Create a great freebie to give away** that helps your target market solve their problems and achieve their goals. Examples include a one-page tips sheet, coaching exercise, infographic, special report or quiz. It could be used as a prize for answering your survey, a gift for newsletter sign-up, a giveaway at the back of the room when you run a workshop - or all three!



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I hope this 3 Month Business Action Planning tool helps you get ready and stay focused, for an awesome year ahead!

Here are 3 quotes to get you inspired to get planning!

1. "Plans are nothing; planning is everything." **Dwight D. Eisenhower**
2. "You were born to win, but to be a winner, you must plan to win, prepare to win, and expect to win." **Zig Ziglar**
3. "It takes as much energy to wish as it does to plan." **Eleanor Roosevelt**

Did you know that at The Coaching Tools Company.com we have plenty more tools and resources to use with your clients?

- Check out our [Vision & Goal-Setting Toolkit!](#)
- **Save yourself time and energy** and find the **perfect resources** to grow your clients.
- **Boost your confidence** and use our tools for **awesome workshops & teleseminars!**
- Great **homework ideas** to keep clients in a coaching frame of mind.
- **Brandable**, Microsoft Word documents - **delivered instantly!**
- Available in [helpful, ready-to-go toolkits](#), organized into themes.

Here are some things to do if you liked this holiday gift from The Coaching Tools Company:

- If you haven't already, get **one free coaching tool a month for 5 months** by [signing up for our newsletter here](#). Starts with the "549 Powerful Coaching Questions" eBook.
- Let your colleagues know about this Holiday Gift and many other Free Coaching Tools and resources at The Coaching Tools Company.com!
- **Like our Facebook Page** and join our Facebook Group [Coaches Helping Coaches](#).

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About the author: Emma-Louise Elsey is the CEO of Simplicity Life Coaching Ltd. (The Coaching Tools Company.com is a division of Simplicity Life Coaching Ltd.) She is a certified Life Coach, NLP practitioner and recovering perfectionist who loves questions, quotes, creating coaching tools and writing. Since qualifying as a coach in 2004 she has worked with many successful professionals and business owners. **Free Coaching Tools:** For inspiration and to help you with your businesses, there are many more [Free Coaching Tools & Templates](#) at **The Coaching Tools Company.com** including more coaching questions, coaching exercises, business admin templates for new coaches and forms to help with your seminars.



Cover image of coach contemplating their business by [Milles Studio](#) via Shutterstock