

UPDATED FOR 2023



MAKE IT HAPPEN!

*My 3 Month Business
Action Planner!*

brought to you by: **THE COACHING
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How to use this Planner

We've updated our holiday gift for 2022 to help you grow your business in 2023.

It's been another challenging year. For many of us, the pandemic shifted the way we live and do business. This year our finances are stretched in new ways—so it's more important than ever that we set goals—and take action towards them.

The idea behind this planner has always been to "keep it simple": consider your vision for the year, and then plan your business "in threes". This means choosing 3 key goals to focus on in 3 month (quarter year) chunks, then choosing 3 key weekly actions that lead you to those 3 month (quarterly) goals.

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 chunks**, it's much easier to succeed.

- Allow yourself around an hour of quiet time to consider the questions in this workbook that help you plan and bring your business vision into reality.

In Part 1

- We start with a review of the previous year—to celebrate and appreciate what you achieved over this last year—and how you learned and grew.
- Then you set a high level vision for your business for the year ahead.

In Part 2

- Once you have your high level vision, you can plan *just* the next 3 months choosing 3 Key Goals for the coming quarter year.
- NOTE: This section of the planner is reusable—and you'll complete these pages again in 3 months time for each succeeding 3 months (quarter) of the year.

And in Part 3 of this Planner

- Once you've chosen your 3 Key Goals for the first 3 months, you can now plan your upcoming month - choosing just 3 Key Actions for each week to support your 3 Key Goals.
- NOTE: This section of the planner is also reusable—and you'll complete this page monthly.



I hope this free holiday gift helps you focus and grow your coaching business.
Warmly, Emma-Louise



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PART 1

Set the Scene

Annual Review & Visioning





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STEP 1. What did you achieve in 2022?

In this section, you'll review the past year so you can acknowledge and celebrate your successes and achievements. This is not just about financial achievements, but also things you've learned, produced—and how you have grown.

It takes as much energy to
wish as it does to plan

Eleanor Roosevelt

What were your top 3 achievements from the last year?

What were the 3 biggest challenges you overcame last year?

What did you create or bring into the world last year?

In what ways did your BUSINESS grow?

In what ways did YOU grow?

WHAT will you celebrate—and HOW will you celebrate?



STEP 2. Your Vision for 2023

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

Consider the areas listed below—and anything else you already have in mind. You can make these SMART goals if you like, however, the key here is to write down and clarify your vision and goals just *enough* so you can plan your next 3 months.

INCOME: Products & Services

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

MARKETING: Activities and Plans

eg. Marketing Plan/Materials, Blog/Newsletter, Social Media Strategy, Networking, Niche Clarifying/Brand, Advertising, Online Challenges etc.

BUSINESS DEVELOPMENT:

eg. Business Relationships & Joint Ventures, Website updates, Products/Services & Offerings to Develop, Events to Participate in etc.

BUSINESS OPERATIONS:

eg. Business/Finance Plans, Business Processes, Office Environment, Organization/Orderliness, Productivity, Legalities, Insurance, Hiring etc.

FINANCES:

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

PERSONAL DEVELOPMENT:

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

OTHER:



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PART 2

Reusable

3 Month Planner





STEP 3. Set Your "Top 3" Quarterly (3 Month) Goals

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

- Review your 2023 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: _____	• • •	• • •



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STEP 4. Wrapping up for Success

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

1. _____ 2. _____ 3. _____

2. My THEME for the next 3 months is _____

3. To achieve my goals I need to BE someone who is _____

4. Self-Sabotage—if I were to get in my own way I would _____

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

6. 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:

7. What is the single most important thing I need to do in 2023? _____

Plans are nothing;
planning is everything.
Dwight D. Eisenhower



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PART 3

Reusable

Monthly Planner





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STEP 5. Your One Month Action Plan

- Print three (3) copies of this page, then use one to plan each upcoming month of the 3 months (quarter year).
- Review your 3 Month Goals from Step 3, 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.				



Bonus: 7 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 share it online where your ideal clients might see it eg. on Social Media, as well as emailing it to your contacts and sharing it on your website 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! You can write your newsletter weekly, two weekly, monthly or even quarterly. Be sure to add value and let people know of any special deals for readers to work with you - or buy your products.
3. **Survey your fans.** Ask them about their biggest problems - and what they would love from you to help. Be sure to wrap-up your survey by thanking them for their time - and asking them to sign up for your newsletter (if they haven't already). [Survey Monkey](#) is one professional survey tool you could use - and it has a free plan so you can learn the ropes.
4. **Run a free 30-60 minute online coaching workshop on a topic of interest to your ideal clients.** It could be a "lunch and learn" where you work - or you could offer it for employees at a company where you already know someone. It could be for your Facebook fans, for your friends and their friends, your book club, an online conference, virtual 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 ideal client 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 gift for answering your survey, a newsletter sign-up thank-you, a giveaway at the back of the room when you run a workshop - or all three!
6. **Run an online social media challenge** that will help your fans and followers get to know you - and position you as an expert. Choose a topic your audience struggles with, and over the course of 5/7/30 days offer a daily video with a super simple activity that helps them overcome that struggle.
7. **Podcasting** is big business these days, and more people are listening to podcasts than ever. Starting your own podcast can be a lot of work, so why not start by being an interviewee? Many podcasters are looking for people to interview, so do your research and approach someone who has a similar ideal client to you, and suggest 3-5 topics you could talk about. Have 3-5 key points ready for each topic - ensuring your information, tips and ideas are useful to the podcaster's audience.



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

If you love goals, you may also like:

- The complete [SMART Goal-Setting Guide for Coaches](#)
- Our [Vision & Goal-Setting Toolkit](#)
- The Free Resource [21 Questions to Extraordinary Goal-Setting](#)

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

- **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 other things to do if you liked this holiday gift:

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

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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