

Planning Worksheet

Goal:

Vision:

Why:

How:

Specific Actions	1	2	3
	*	*	*
	*	*	*
	*	*	*

Daily Actions	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18

Post this in a place that is visible to you daily

Check out www.FinancialWellnessCoach.ca for additional resources and to schedule your FREE coaching consultation.

Planning Example

Goal:
A full client load by Oct 16th

Vision:
I empower women to take control of their time and money by showing them how to manage their brain. A vision of a world where we are focused on creating value and elevating each other. A movement of women all focused on making the world a better place through the creation of value.

Why:
I have the ability to help women become stronger, more confident, and more intentional. This is my purpose. It feels like my calling to make a difference and make the world a better place.

How:
Create webinars and a workshop. Grow my email list and send out more frequent emails. Write blogs and make daily posts on Social Media. Advertise. Make offers. Ask for referrals.

Specific Actions	1	2	3
	<ul style="list-style-type: none"> * Schedule webinars for Sep 20th and Sep 27th * Schedule workshop for Sep 27th or Oct 4th * Create outlines * Practice * Advertise 	<ul style="list-style-type: none"> * Advertise freebies * Send 3 emails/week 	<ul style="list-style-type: none"> * Daily SM posts * Ask for referrals * Post 3 blogs/week * Record video

Daily Actions	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Practice webinar	✓	✓		✓	✓													
Send email	✓	✓	✓	✓														
SM post	✓	✓		✓	✓													
Make offers	✓	✓	✓	✓	✓													
Ask for referral	✓	✓		✓														
Create blog	✓		✓		✓													

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