

invent  
RESULTS

GOAL SETTING AND PLANNING

# THE PROCESS

- 1) Where do you want to be?
- 2) Where are you?
- 3) Why do the gaps exist?
- 4) What do you need to fill the gaps?
- 5) What do you do first?
- 6) How do you know?

# Stupid Goals

“I know what I want. Now I just gotta go get it”

“Goals are so fake.”

“I hate setting goals because I feel like crap when I don’t hit them.”

“No one is going to force me to commit to some lame-ass goal that only benefits them”

*This is about working on YOUR business.*

*Not IN your business.*

*This is not a RA RA session. No one is forcing your to be here.*

*You are here, at least partially, because you believe you have something to offer the world, your family and yourself in 2024.*

*We believe that we can help you with just that.*

*Because we WANT to!*

*Because that’s OUR GOAL.*

# What is your Vision?

What EXACTLY does success look like?

*Be specific.*

*If I tell you I want to move West this year and move exactly one house to the West...you get the point.*

# FILL THE BANKS!

Try answering these questions...

- How much *choice* TIME do you want every week?
- What do you want to LEARN this year?
- How much REVENUE do you desire?
- How HARD do you want to work everyday?

Let your *VISION* be your  
*GOALS* and *NAME* them.

MONEY = \_\_\_\_\_

TIME = \_\_\_\_\_

WISDOM = \_\_\_\_\_

ENERGY = \_\_\_\_\_

OTHER = \_\_\_\_\_

# Vision Without Execution Is Hallucination

Time to EAT THE BURGER!

# Break Down the Burger!

*“What the heck is he talking about?”*

- Name the Goal (again, be specific)
- Look for the gaps between present day and end goal achieved.
- Be INTENTIONAL and be HONEST
- Name the GAPS and WRITE THEM DOWN
- Have fun
- Focus on the ABSOLUTES



# ABSOLUTES of LIFE

**YOU** are responsible for how you are seen by others. Your words. Your actions. They put you on blast - like it or not.

**YOU** are responsible for your income. Period. Every excuse you make to the contrary is a waste of energy that could otherwise be spent on actually generating income.

**YOU** are responsible for what you do with your money. The choices you make today will either be credit or debt. There's no middle ground.

**YOU** are responsible for your commitments. Your promises matter beyond the person you make them to. Who, what, when, where and how you, decide and act to, deliver on them affects EVERYTHING.

# ABSOLUTES of BUSINESS

- **Marketing** (how you present / how you're known and seen)
- **Sales** (how you gain market share and revenue)
- **Finance** (all things money)
- **Operations** (who, what, when where, how you deliver on your commitments)

Our Commitments are as Deep as Our  
***WHY***

# Goal:

---

Start asking WHY this goal is not your *present reality*.

Why?

Why?

Why?

Why?

Why?

When your answer sparks an idea/action, write it down!

# Money Goal: \$5,000,000 revenue

## MARKETING GAPS

- Why #1 - I have no idea how many people/businesses know about me
- Why #2 - I have no process to measure my imprint/presence
- Why #3 - I do all my marketing myself and I only know a little about it
- Why #4 - I haven't committed money to a marketing partner
- Why #5 - I have no budget for it

# Money Goal: \$5,000,000 revenue

## SALES GAPS

- Why #1 - I haven't secured enough clients
- Why #2 - I'm not too sure how. I don't have a sales "vehicle"
- Why #3 - I haven't taken the time to develop a sales process
- Why #4 - I don't know how
- Why #5 - I haven't spent enough time and energy to learn

# Money Goal: \$5,000,000 revenue

## FINANCE GAPS

- Why #1 - I don't have any targets to aim at
- Why #2 - I haven't planned that far ahead
- Why #3 - I didn't connect the dots to make it important
- Why #4 - I don't have the data
- Why #5 - I don't know where/how to get it

# Money Goal: \$5,000,000 revenue

## OPERATIONS GAPS

- Why #1 - I am working hard but not making money
- Why #2 - I have distractions and inefficiencies
- Why #3 - I am not sure what to do first
- Why #4 - I am going in 50 directions at once
- Why #5 - I don't have enough resources



# Money Goal: \$5,000,000 revenue

## MARKETING NEEDS

- Build a Marketing Budget
- Identify free ad services and utilize
- Commit to one Social/Networking Event per week
- Find a marketing partner that will work within your budget and OUTSIDE your circle of influence

# Money Goal: \$5,000,000 revenue

## SALES NEEDS

- Define a Sales Budget
- Identify Mentors and Invest in Your Education
- Find Strategic Partners/Employees to Help Grow Sales
- Build a Weekly/Monthly/Quarterly Sales Activity Cycle
- Stay Connected to Every Client You've Had and ASK FOR REFERRALS

# Money Goal: \$5,000,000 revenue

## FINANCE NEEDS

- Name a revenue plan for the next 5 years - Begin with the end in mind!
- KNOW where ALL your money came from and went to. BUILD A BUDGET!
- Define CLEARLY what the 3 to 5 most important Performance Indicators are.
- Identify the method to measure progress
- Create a weekly / monthly / quarterly revenue goal

# Money Goal: \$5,000,000 revenue

## OPERATIONS NEEDS

- Take an honest inventory of what I am good at and what I suck at
- Perform a decision analysis to identify what tasks are most valuable
- Find a strategic partner task managers/doers
- Simplify EVERYTHING - Don't do anything TWICE
- Define and Instill PERFECT communication practices
- Build 5 income streams

# Time Goal: Freedom to choose when I do what I do

## MARKETING GAPS

- Why #1 - I spend a ton of time branding, marketing, social media management
- Why #2 - There's no one else to do it
- Why #3 - I haven't found a partner I can trust or afford

# Time Goal: Freedom to choose when I do what I do

## SALES GAPS

- Why #1 - If I'm not selling, no one is selling
- Why #2 - No sales rep plan
- Why #3 - No catalogue to share/train on
- Why #4 - No commission structure defined

# Time Goal: Freedom to choose when I do what I do

## FINANCE GAPS

- Why #1 - I'm not independently wealthy
- Why #2 - My money isn't making me money

# Time Goal: Freedom to choose when I do what I do

## OPERATIONS GAPS

- Why #1 - I have not established enough partners to support product delivery in my time off
- Why #2 - The processes I use have not been optimized and simplified enough to share/teach partners/employees.



# Time Goal: Freedom to choose when I do what I do

## MARKETING NEEDS

- Build a Marketing Budget
- Identify free ad services and utilize
- Find a marketing partner that will work within your budget and OUTSIDE your circle of influence

# Time Goal: Freedom to choose when I do what I do

## SALES NEEDS

- Product Catalogue
- Commission agreement
- Find Strategic Partners/Employees to Help Grow Sales

# **Time Goal: Freedom to choose when I do what I do**

## **FINANCE NEEDS**

- 12 months of operational reserves
- Create auto-populated dashboard of KPI's

# Time Goal: Freedom to choose when I do what I do

## OPERATIONS NEEDS

- Document processes aligned with catalogue
- Document expected results for execution and reporting
- Find a strategic partner task managers/doers
- Name the items I don't HAVE to do and either STOP or DELEGATE

# Energy Goal: Do what I LOVE everyday

## MARKETING GAPS

- Why #1 - I prefer to do it on a beach

# Energy Goal: Do what I LOVE everyday

## SALES GAPS

- Why #1 - No clear catalogue of products that align with my most enjoyable tasks
- Why #2 - I am selling my time and NOT my knowledge

# Energy Goal: Do what I LOVE everyday

## FINANCE GAPS

- Why #1 - Not clear on how to spend time to deliver the most revenue in the least time doing what I love the most.

# Energy Goal: Do what I LOVE everyday

## OPERATIONS GAPS

- Why #1 - Mundane tasks exist
- Why #2 - I'm the only one that knows how to ...
- Why #3 - No path toward team growth
- Why #4 - Afraid to have others represent my brand



# Energy Goal: Do what I LOVE everyday

## MARKETING NEEDS

- Focus product offering in warm climates
- Brand/Promote products most enjoyable in every climate

# Energy Goal: Do what I LOVE everyday

## SALES NEEDS

- Name products that are the most enjoyable and catalogue them
- Change sales from 1:1 to 1:100 - Sell knowledge to more people in the same amount of time

# Energy Goal: Do what I LOVE everyday

## FINANCE NEEDS

- Develop a profitability report by product

# Energy Goal: Do what I LOVE everyday

## OPERATIONS NEEDS

- Document processes aligned with catalogue
- Document expected results for execution and reporting
- Find a strategic partner task managers/doers
- Name the items I don't HAVE to do and either STOP or DELEGATE

# **Wisdom Goal: Become a Managing Broker**

## **MARKETING GAPS**

- None

# Wisdom Goal: Become a Managing Broker

## SALES GAPS

- None

# Wisdom Goal: Become a Managing Broker

## FINANCE GAPS

- Why #1 - No budget for education
- Why #2 - No budget for marketing
- Why #3 - No business plan

# Wisdom Goal: Become a Managing Broker

## OPERATIONS GAPS

- Why #1 - Not yet qualified (2 year as broker req)
- Why #2 - Have not attended classes



# **Wisdom Goal: Become a Managing Broker**

## **MARKETING NEEDS**

- Build a Marketing agenda upon licensing

# Wisdom Goal: Become a Managing Broker

## SALES NEEDS

- None

# Wisdom Goal: Become a Managing Broker

## FINANCE NEEDS

- Create a education budget
- Create a marketing budget
- Build a business plan

# **Wisdom Goal: Become a Managing Broker**

## **OPERATIONS NEEDS**

- Investigate best education resources
- Plan time block to be fully engaged in training process
- Study laws and regulations

# PRIORITIZE!!!

Assess across 3 categories (5 to 1 scale)

- a) Immediacy / Urgency
- b) Parent / Child
- c) Ability to Execute

FOR EXAMPLE...

<b>MARKETING NEEDS</b>				
Build a Marketing agenda upon licensing	1	5	3	15
Focus product offering in warm climates	2	3	3	18
Brand/Promote products most enjoyable in every climate	2	3	3	18
Build a Marketing Budget	5	5	3	75
Identify free ad services and utilize	4	5	3	60

# PLAN!!!

## Q1

All tasks of highest priority

Must contain most if not ALL parents

*REASSESS and REPRIORITIZE*

## Q2

Higher priority action items

Any and ALL remaining Parents

*REASSESS and REPRIORITIZE*

## Q3

All tasks of medium priority

90% of all tasks should be completed by EOQ

*REASSESS and REPRIORITIZE*

## Q4

All remaining tasks closed out or cancelled

Begin building your next year

# **REPORT!!!**

***INSPECT WHAT YOU EXPECT!***

**No matter how much you do or how hard you work, you have to move the needle.**

**Give yourself and your team the chance to see the truth EVERY MONTH!**

**KPI Reports  
Action Item Lists  
Accountability Partners  
And more...**