

CEO Planning *Guide for 2021*

BUSINESS MAPPING FOR THE NEW YEAR

This guide will assist you in mapping out your new year from a CEO perspective. It incorporates the previous year data and your future plans - all from a high level perspective.

Which *perspective* are you planning from?

CEO	Freelancer
<input checked="" type="checkbox"/> Makes decisions from a worldview perspective.	<input type="checkbox"/> Considers what is in front of them (time, bank balance, upcoming bills) when making decisions.
<input checked="" type="checkbox"/> Considers the business to be a large organization with many departments (even if there is a single operator).	<input type="checkbox"/> Considers themselves to be the only person who can produce the product/service.
<input checked="" type="checkbox"/> Believes that time & money are equal in value. Delegates in order to achieve results w/out costing personal time. Rarely rejects an opportunity that can be delegated.	<input type="checkbox"/> Uses personal time to achieve results. Rarely delegates. Sees the limitation of time.
<input checked="" type="checkbox"/> Knows their numbers (profit margin, COGS, closing ratios, etc).Resourceful.	<input type="checkbox"/> Considers their earnings to be all their own money - no distinction between business & personal funds.
<input checked="" type="checkbox"/> Focuses on leadership, building a team, solving problems, & scaling.	<input type="checkbox"/> Focuses on client retention, increasing hourly rates, technical skills, & time management.



5 Step to Strategizing the New Year

Follow the steps below if you want a focused and strategic plan. This method provides a wholistic and analytical approach while also reminding you to think with your CEO hat. You can use this guide in conjunction with your creativity for the best visual plan!

01

Intentions

What are your intentions for the year? Write them down. Intentions come from within. They are mindful. Intentions are used to give thought before actions are ever taken. They consider what you desire or aspire to be/do. Intentions consider purpose, mission, values, feelings, fears, and needs.

02

Prepare

Gather last year's data. List everything related to the upcoming year. Gather important dates. Gather anything you will need to create a worldview of your business.

03

Prioritize

Put everything you've gathered in a priority order. Ask yourself: What is most important to you? What brings in your current and steady income? What is the easiest for you to accomplish? What do your customers need the most?

04

Plan

Map out your year in a timeline form and reference the lists you've created. When will you perform the launch? When will you create the new products/services? What content themes will you use for each month? What month will you do the clean-up projects?

05

Worldview

Once you've got everything visually mapped out... stand back and look at your masterpiece. Look for holes, missing elements, and the overall plan. Does it flow? Are the timelines realistic?

examples of intentions

- I intend to respond first and then react.
- I intend to lead by example.
- I intend to see the goodness around me.
- I intend to make more 1:1 connections.
- I intend to write more relevant and authentic content.
- I intend to take better care of my body
- I intend to get more rest
- I intend to spend more time in nature
- I intend to write more personal connection emails
- I intend to spend more time in nature

Step One

SETTING YOUR INTENTIONS

This guide will assist you in mapping out your new year from a CEO perspective. It incorporates the previous year data and your future plans - all from a high level perspective.

Take some time to gather your intentions for the upcoming season of your life. Intentions consider purpose, mission, values, feelings, fears, and needs. Intentions come from within.

Your Year's Intentions

1 Question

What do you intend to do, feel, or see this year?

2 Question

What you desire or aspire to be or have this year?

3 Question

What one thing do you intend to do every day in your life?

Notes

Step *Two*

PREPARE YOUR DATA *Previous & Current*

This guide will assist you in mapping out your new year from a CEO perspective. It incorporates the previous year data and your future plans - all from a high level perspective.

Planning Prep Checklist

Utilize the list below to gather necessary data during the "prepare" stage. Collecting this data may take time to gather, but it is very valuable information when creating a results-driven strategy. Do not skip this step.

Previous Year

- ☐ What you enjoyed the most in previous year
- ☐ Highest performing posts on social media in previous year
- ☐ Highest website traffic source or backlink
- ☐ Highest website traffic blog
- ☐ Most purchased item from your customers last year
- ☐ Highest performing ads last year
- ☐ Greatest lead source & conversion ratio previous year
- ☐ Best or favorite customers from previous year
- ☐ Any surprised failures from previous year
- ☐ Busy season + Slow Season

Upcoming Year

- ☐ New products / services
- ☐ New content themes
- ☐ New marketing channels
- ☐ New lead sources
- ☐ New clean up projects
- ☐ New team members

NOTES

Important Dates

- ☐ Business anniversary date
- ☐ Important personal dates (birthdays, etc)
- ☐ Scheduled Conferences
- ☐ Scheduled Masterminds

Financial Reports

- ☐ Revenue or Total Sales
- ☐ Profit & Loss
- ☐ Overhead Costs
- ☐ COGS or job related expenses
- ☐ Lead Acquisition Cost
- ☐ Sales closing ratio

New Products

List any new products or services that you're coming out with this year. Then, put them in priority order.

<i>Product Ideas</i>	<i>Goal Date</i>	<i>Done</i>
01		
02		
03		
04		
05		
06		
07		
08		
09		
10		
11		
12		

My quick notes

New Team Members

List any new team members or subcontractors that you plan to hire this year. Then, put them in priority order.

<i>Team Members to Hire</i>	<i>Goal Date</i>	<i>Done</i>
01		
02		
03		
04		
05		
06		
07		
08		
09		
10		
11		
12		

My quick notes

Projects to be Completed

List any projects that need to be completed These should be clean-up projects that do not directly impact revenue earnings. Once listed, put them in priority order.

Projects	Goal Date	Done
01		
02		
03		
04		
05		
06		
07		
08		
09		
10		
11		
12		

My quick notes

New Marketing Channels

List any marketing channels that you want to try this year. Consider what month you want to get started with the new channel. Put them in priority order.

<i>Marketing Channels</i>	<i>Goal Date</i>	<i>Done</i>
01		
02		
03		
04		
05		
06		
07		
08		
09		
10		
11		
12		

My quick notes

Step *Three*

PRIORITIZE YOUR GOALS

This guide will assist you in mapping out your new year from a CEO perspective. It incorporates the previous year data and your future plans - all from a high level perspective.

Prioritize

Put everything you've listed & gathered in a priority order. Ask yourself: What is most important to you? What brings in your current and steady income? What is the easiest for you to accomplish? What do your customers need the most?

2 ⁰¹	New Digital Download	April	✓
4 ⁰²	Roll out with Memberships	September	
1 ⁰³	Create Stock Photos	March	✓
3 ⁰⁴	New Clubhouse Channel	August	
X ⁰⁵	Canva Template for Shops	May	

Challenge: Try this step with sticky notes for the ultimate visual experience!



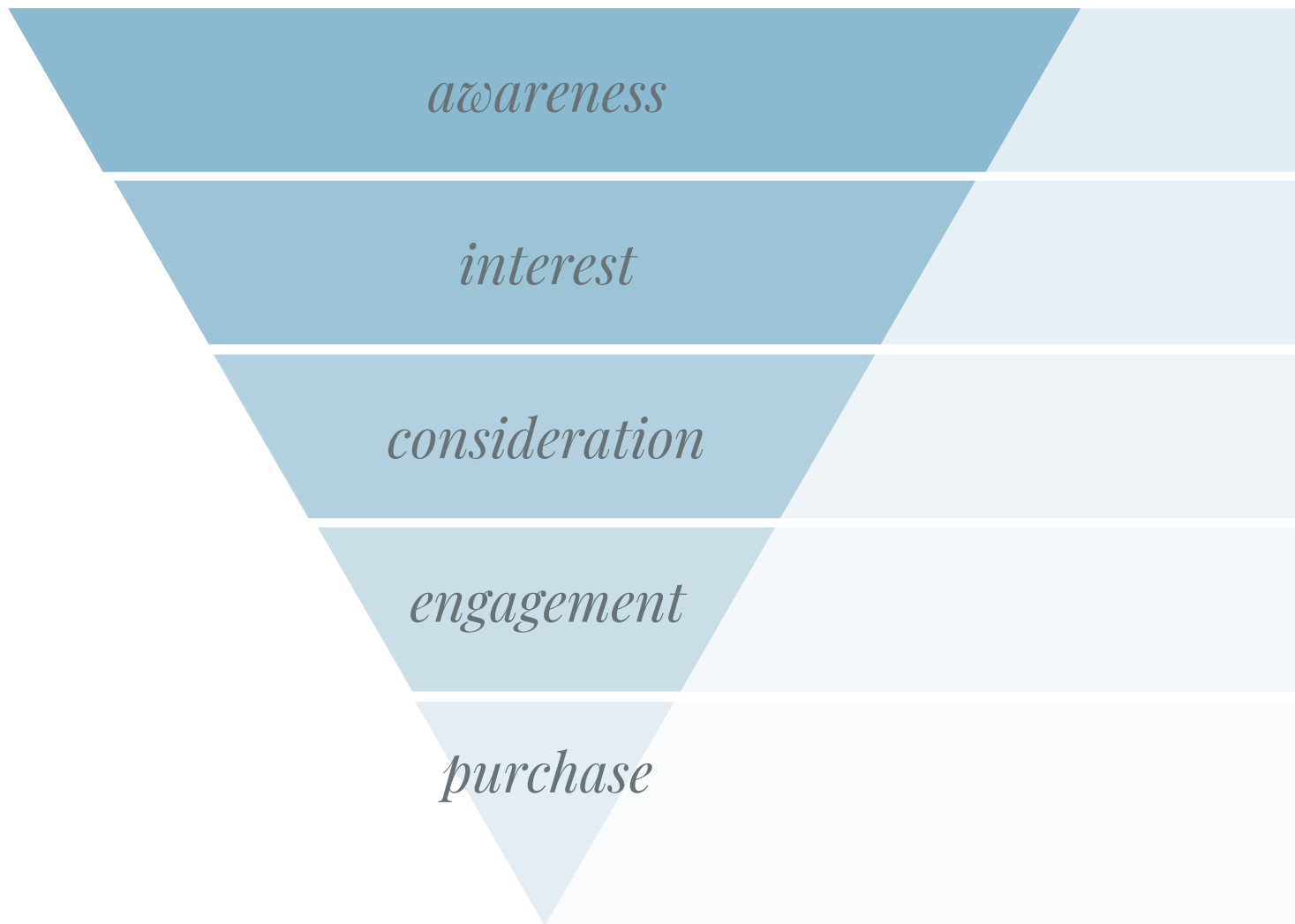
Step Four

MAP OUT YOUR PLANS VISUALLY

This guide will assist you in mapping out your new year from a CEO perspective. It incorporates the previous year data and your future plans - all from a high level perspective.

Sales Funnel

A funnel measures conversion rates
through the sales process

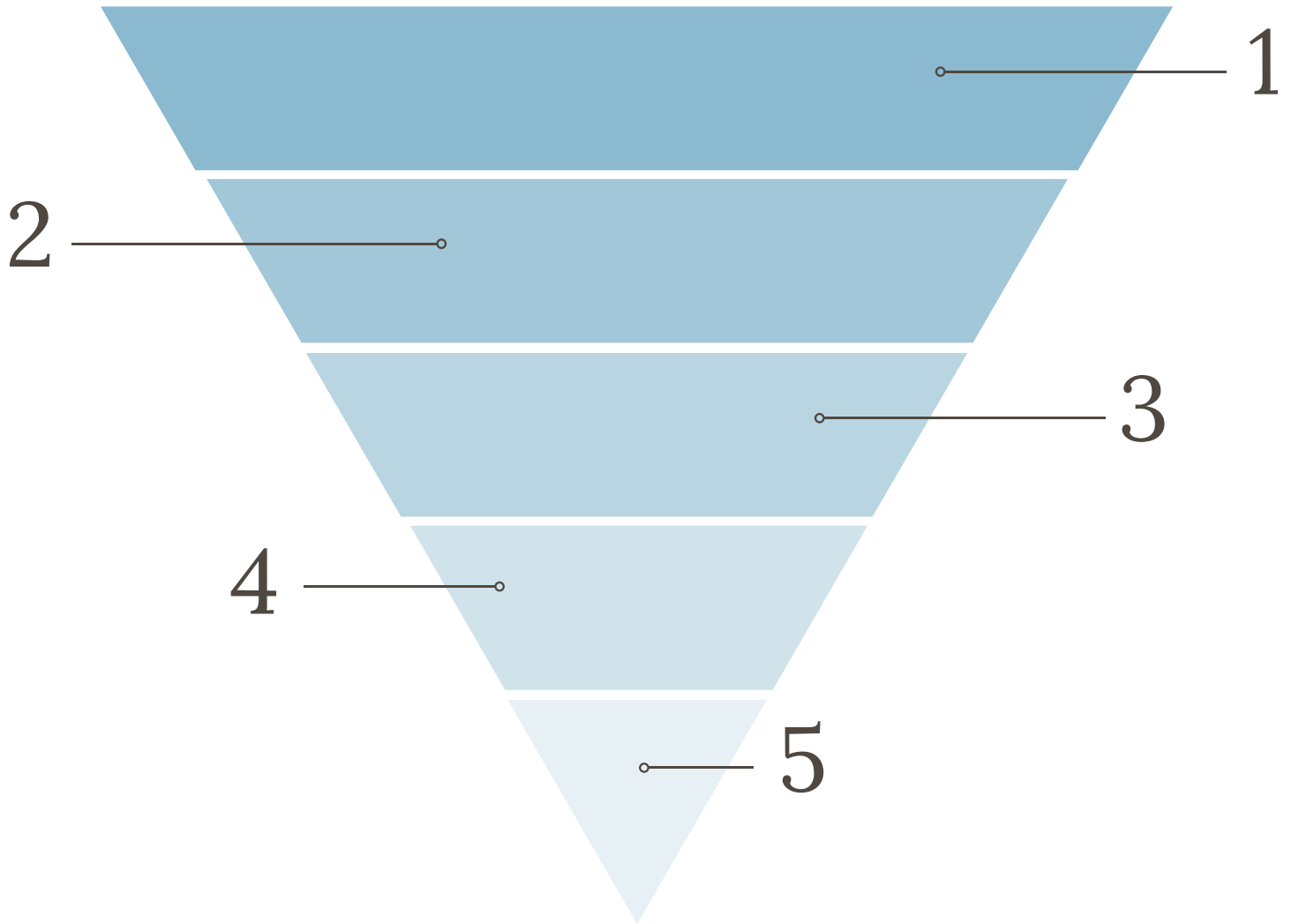


Your Funnel

Find time to draw out your own, specific sales funnel. By defining how your ideal customer becomes aware, gains interest, considers the purchase, engages with you, decides to purchase, and then receives your product/service - you are getting clear on your customer's journey through your business. This is valuable when strategizing your business as the CEO.

Your Sales Funnel

CREATE A MAP OF YOUR
CUSTOMER'S JOURNEY THROUGH
THE SALES OF YOUR BUSINESS



FUNNEL TITLES

NOTES

1	
2	
3	
4	
5	

--

Your Dashboard

Give yourself a CEO perspective on what is planned for the year. Input brief answers for each month by the corresponding items. Do not go into too many details.

1

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

2

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

3

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

4

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

5

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

6

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

- BUILD: *What are **you** building for the business this month? A new product? new service? SOPs? Website? Landing Page? List the one big item **you** need to build.*
- TEAM: *What is your team building for the business this month? This is non-client work.*
- PITCH: *What are you selling this month? Realistically, you're selling all products & services... but which product are you focusing on? What's the pitch? (Problem & solution)*
- CONTENT: *What is your content theme for the month? This should probably correspond to the product you're pitching. Don't get in the weeds... just give a short theme description.*
- PROJECT: *What clean-up project are you working on this month? One project is enough. ;P*

Your Dashboard

Give yourself a CEO perspective on what is planned for the year. Input brief answers for each month by the corresponding items. Do not go into too many details.

7

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

8

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

9

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

10

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

11

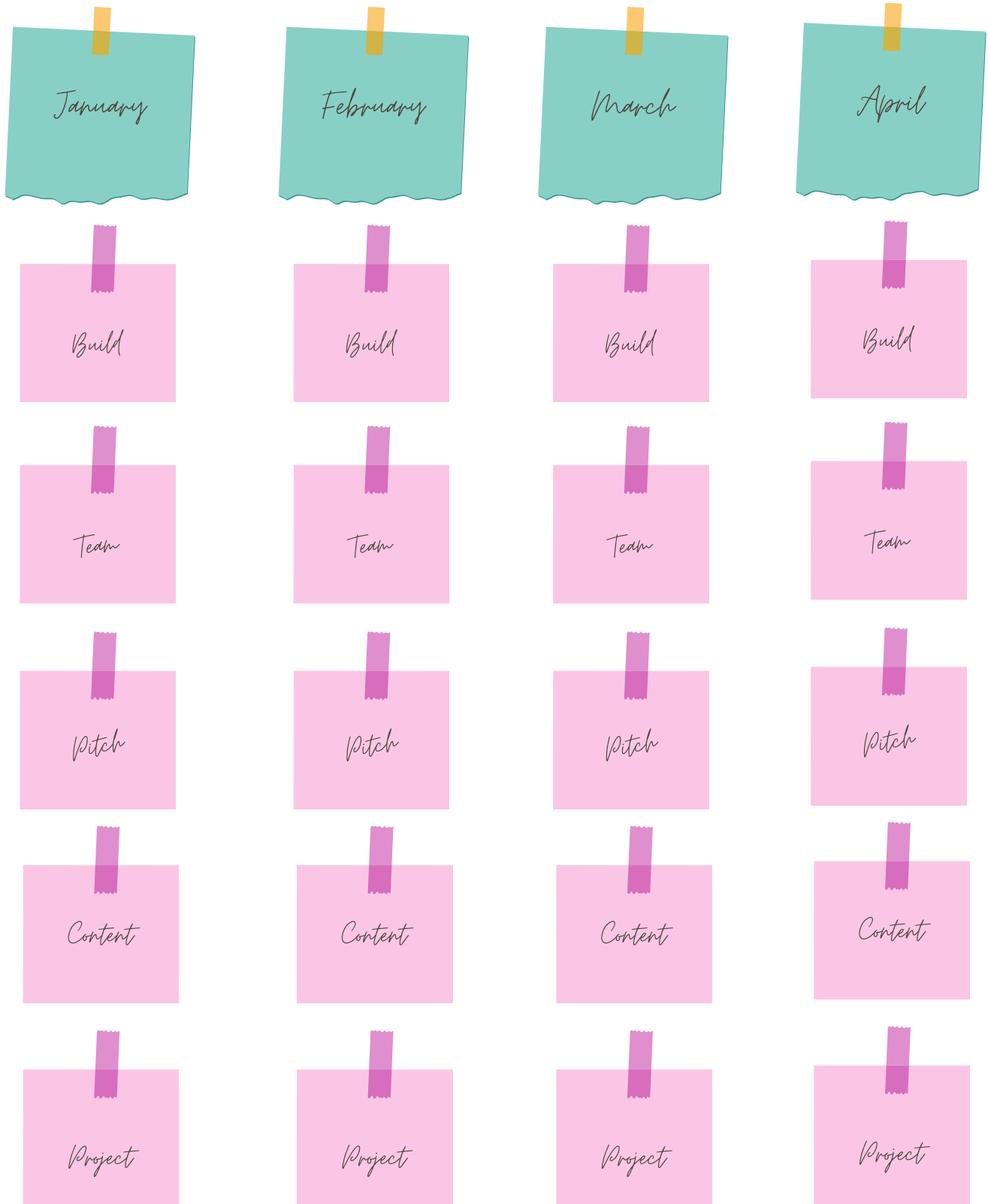
- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

12

- ☐ BUILD:
- ☐ TEAM:
- ☐ PITCH:
- ☐ CONTENT:
- ☐ PROJECT:

- BUILD:** What are **you** building for the business this month? A new product? new service? SOPs? Website? Landing Page? List the one big item **you** need to build.
- TEAM:** What is your team building for the business this month? This is non-client work.
- PITCH:** What are you selling this month? Realistically, you're selling all products & services... but which product are you focusing on? What's the pitch? (Problem & solution)
- CONTENT:** What is your content theme for the month? This should probably correspond to the product you're pitching. Don't get in the weeds... just give a short theme description.
- PROJECT:** What clean-up project are you working on this month? One project is enough. ;P

Challenge: Try this step with sticky notes for the ultimate visual experience!



Step *Five*

CHECK IT ALL FROM A WORLDVIEW

This guide will assist you in mapping out your new year from a CEO perspective. It incorporates the previous year data and your future plans - all from a high level perspective.

Worldview

Once you've got everything visually mapped out... stand back and look at your masterpiece. Look for holes, missing elements, and the overall plan. Does it flow? Are the timelines realistic?

This is your CEO Dashboard!

Now that you've got your plans mapped out, consider this the start to your CEO Dashboard! You can expand upon this dashboard by adding your financial goals, # of leads, & other data that you want to track from month to month.

Transfer Data to an Electronic View

Now we know that you're a busy woman who goes lots of places! Why not create an electronic version of your CEO dashboard for easy access? Unless... you're planning to keep those sticky notes up on your wall for the entire year...?

We're going to make the electronic CEO dashboard WAY EASY for you! Click the link below to download the premade template in Trello. New to Trello? It's FREE. All you have to do is click the link & start using the template.

[**Download the
Trello Template**](#)

Wins Tracker

Track your accomplishments for the year in one place. Flip to this sheet every quarter and write down which goals you've accomplished. Then, reference this document when planning the next year!

Q1

What wins can you celebrate for quarter 1? List them out & take time to celebrate.

.....	■
.....	■
.....	■
.....	■
.....	■
.....	■

Q2

What wins can you celebrate for quarter 2? List them out & take time to celebrate.

.....	■
.....	■
.....	■
.....	■
.....	■
.....	■

Q3

What wins can you celebrate for quarter 3? List them out & take time to celebrate.

.....	■
.....	■
.....	■
.....	■
.....	■
.....	■

Q4

What wins can you celebrate for quarter 4? List them out & take time to celebrate.

.....	■
.....	■
.....	■
.....	■
.....	■
.....	■

Copyright *notice*

All information, training, lessons, instructions, worksheets, and anything provided during this event is owned by the Society of Women Business Owners aka (SOWBO). This content is not to be redistributed or copied in any way. You may not take our training and retrain under your own entity.

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other noncommercial uses permitted by copyright law.