OPTIMIZED SUCCESS

SUCCESS PLAN

SUCCESS PLAN

I. THE VISION

II. THE WHY

III. THE PLAN

IV. ASSESS WHERE YOU ARE AT

V. ACTION

VI. RESULTS

"A goal without a plan is just a wish."

Antoine de Saint-Exupery

CREATE THE

VISION

PICTURE YOURSELF IN 12 MONTHS

WHAT DOES YOUR LIFE LOOK LIKE? WHAT DOES YOUR BUSINESS LOOK LIKE? WHAT DOES YOUR PERSONAL LIFE LOOK LIKE? WHAT DO YOUR RELATIONSHIPS LOOK LIKE? WHAT DOES YOUR SPIRITUAL LIFE LOOK LIKE?

USE THE SPACE BELOW TO VISUALIZE THE FUTURE THAT YOU WANT FOR YOURSELF IN ALL AREAS OF YOUR LIFE. DO NOT HOLD BACK -- PAINT THE PICTURE OF YOUR DESIRED FUTURE.

CHOOSE A WORD FOR THE YEAR TO FOCUS ON AND DEFINE YOUR YEAR. SHARE IT HERE AND EXPLAIN WHY YOU CHOSE IT.

"If you don't know where you are going, you will probably end up somewhere else."

–Lawrence J. Peter

MY VISION

today's date :

WHY DO THESE GOALS MATTER TO YOU?

IT'S NOT ENOUGH TO WANT IT -- YOU NEED TO WANT IT FOR THE RIGHT REASONS. WHEN THINGS GET TOUGH, THESE REASONS WILL KEEP YOU MOTIVATED AND MOVING FORWARD.

USE THE SPACE BELOW TO WRITE ALL THE REASONS THESE GOALS MATTER TO YOU. WHAT DO THEY MEAN FOR YOUR FUTURE? WHAT HAPPENS IF YOU DON'T ACHIEVE THEM?

"Starve your distractions. Feed your focus.

-Unknown

MY WHY

today's date :

WHY DO YOU DO WHAT YOU DO?

WHY IS THIS IMPORTANT TO ME?

WHY IS _____ IMPORTANT?

WHY IS _____ IMPORTANT?

WHY IS _____ IMPORTANT?

WHY IS _____ IMPORTANT?

YOUR ULTIMATE WHY:

A LOOK AT MY LIFE TODAY

today's date :

BUSINESS

CURRENT CLOSED VOLUME FOR THE YEAR: _____

HOW MANY UNITS OF CLOSED VOLUME: _____

EXPENSES TO RUN MY BUSINESS MONTHLY ARE: _____

EXPENSE	MONTHLY COST	TOTALS

TEAM

MY CURRENT TEAM IS:

NAME	POSITION	INCOME

RESULTS / GOALS

1.

DATE:

2.

DATE:

3.

DATE:

4.

DATE:

5.

DATE

ACTION STEPS

MARKETING PLAN

ACCOUNTABILITY PLAN

LEADERSHIP

FINANCES

MY ANNUAL INCOME IS: _____ THROUGH (DATE): _____

MY TOTAL SAVINGS ARE:

CHECKING: _____ SAVINGS: _____

401K: _____ EQUITY IN HOME: _____

EQUITY IN OTHER PROPERTIES: _____

RETIREMENT: _____ ACCOUNTS: _____

CASH: _____ MONEY MARKET: _____

DEBT

MY CURRENT DEBT TOTAL:

HOUSE: _____ CREDIT CARDS: _____

OTHER PROPERTIES: _____ AUTOMOBILE: _____

MISCELLANEOUS

TYPE	AMOUNT

RESULTS / GOALS

1.

DATE:

2.

DATE:

3.

DATE:

4.

DATE:

5.

DATE

_____

_____

_____

_____

ACTION STEPS

ACCOUNTABILITY PLAN

MY PERSONAL HEALTH

I EXERCISE _____ TIMES PER WEEK

MY DIET MAKES ME FEEL ENERGETIC AND SATISFIED: YES / NO

ON MOST DAYS, I PHYSICALLY FEEL MY BEST: YES / NO

I HAVE SUFFICIENT TIME TO PRIORITIZE MY HEALTH: YES / NO

I AM GOING TO IMPROVE MY HEALTH IN THE FOLLOWING WAYS::

_____

_____

_____

_____

_____

_____

_____

_____

_____

"The most important relationship in your life is the relationship you have with yourself. Because no matter what happens, you will always be with yourself."

Diane von Furstenberg

RESULTS / GOALS

1.

DATE:

2.

DATE:

3.

DATE:

4.

DATE:

5.

DATE

_____

_____

_____

_____

ACTION STEPS

ACCOUNTABILITY PLAN

SPIRITUALITY/ RELATIONSHIPS

DREAMS/ REALITY

HOW DOES YOUR VISION FOR NEXT YEAR DIFFER FROM YOUR CURRENT LIFE? WHAT DO YOU NEED TO DO/CHANGE TO MAKE IT THIS VISION A REALITY?

USE THE SPACE BELOW TO BRAINSTORM IDEAS ON HOW TO MAKE YOUR DREAMS A REALITY.

WHAT AREAS OF YOUR LIFE NEED THE MOST WORK TO MEET YOUR VISION? PERSONAL LIFE? RELATIONSHIPS? BUSINESS? SPIRITUAL LIFE?

”

YOU CAN TAKE THE FIRST STEP TO ACHIEVE YOUR VISION & YOUR DREAMS TODAY. RIGHT NOW. WHAT CAN YOU DO TODAY TO TAKE ONE STEP TOWARDS YOUR GOALS?

“

-Cyndi Garza

HOW YOU WILL ACHIEVE YOUR GOALS STARTS WITH THE FIRST QUARTER

IDENTIFY THE TOP THREE THINGS YOU NEED TO ACHIEVE TO REACH YOUR GOALS IN EACH CATEGORY.

PERSONAL LIFE

1. _____

_____

2. _____

_____

3. _____

_____

BUSINESS

1. _____

_____

2. _____

_____

3. _____

_____

FINANCES

1.

2.

3.

SPIRITUALITY

1.

2.

3.

"Never quit. It is the easiest cop-out in the world. Set a goal and don't quit until you attain it. When you do attain it, set another goal, and don't quit until you reach it. Never quit."

–Bear Bryant

RELATIONSHIPS

1.

2.

3.

WHAT WILL THE THREE BIGGEST CHALLENGES BE TO MEETING THESE GOALS?

1.

2.

3.

WHAT CAN YOU DO TO OVERCOME THESE CHALLENGES?

> **SUCCESS DOESN'T COME FROM WHAT YOU DO OCCASIONALLY. IT COMES FROM WHAT YOU DO CONSISTENTLY.**

-Marie Forleo

TAKE ACTION

WHAT ACTIONS ARE NECESSARY TO REACH YOUR GOALS? LIST THEM HERE.

BE RESOURCEFUL

WHAT RESOURCES DO YOU HAVE AVAILABLE TO HELP YOU REACH YOUR GOALS? LIST THEM HERE.

MOST IMPORTANT GOAL OF THEM ALL

EVERY SUCCESSFUL PERSON BEGINS WITH TWO BELIEFS:

THE FUTURE CAN BE BETTER THAN THE PRESENT, AND I HAVE THE POWER TO MAKE IT SO.