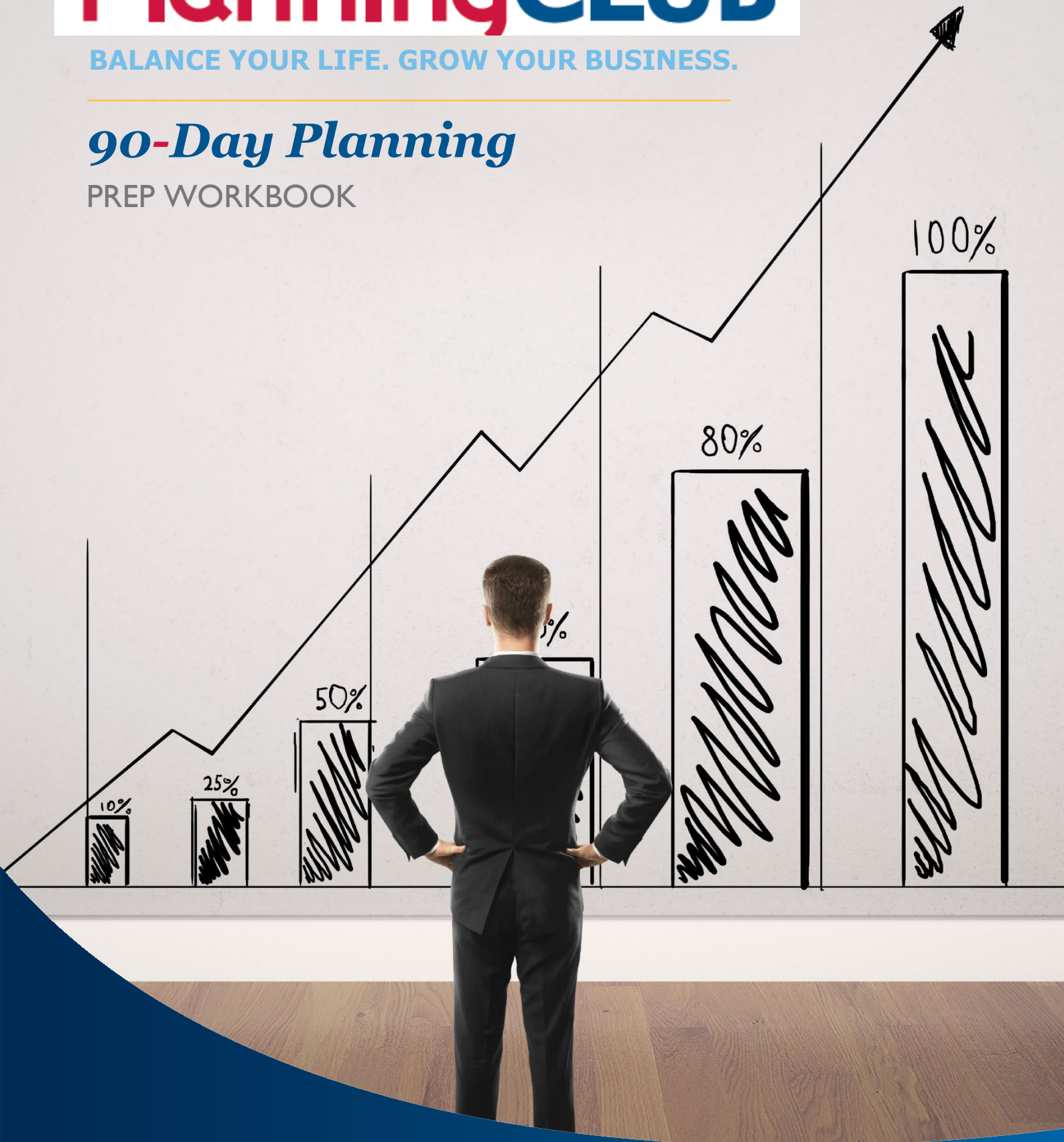


PlanningCLUB

BALANCE YOUR LIFE. GROW YOUR BUSINESS.

90-Day Planning

PREP WORKBOOK



ActionCOACH[®]
BUSINESS COACHING

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

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Rearview Mirror

Your business' past performance. Did your business perform as well you wanted it to in the last 12 months?

It is very important to look in the rearview mirror before you plan for the future.

How did your business perform in the past 12 months? Where is your business right now? Is it where you expected it to be? Take a few moments to write an over-view of how you see your current business situation . How are the profits in the business? Is the team working effectively and productively together? How much time are you currently spending working *IN* the job of the business rather than working *ON* the business? Remember to put down your general feelings on how you think the business is doing at the moment .

Looking Back

What Goals/Milestones did you achieve in the last year?

What difference has this made to you and your business?

What didn't you achieve that you had intended to?

Why not? (Stay above the point of power—be honest)

What has been the impact to you and the business?

What haven't you finished that you need to carry over or continue working on?

Financial Achievements

Let's put in some numbers ...

Number of Leads	4,000
x Conversion Rate	x 25%
=	= 1,000
Customers	
x # of Transactions	x 2
=	x \$100
Avg. \$\$\$ Sale	= \$200,000
Revenue	
x Profit Margins	x 25%
=	= \$50,000
Profit	

ActionCOACH
business coaching

How healthy were your finances in the last 12 months?

Last Years Financials

Yearly

Monthly (/ 12)

(1) Total Sales Revenue

(2) Total COS/COGS/Variable Costs

(3) Gross Profit Value (1-2) & Percentage (3/1)

(4) Total Expenses/Overheads

(5) Net Profit (3-4)

This Years Projections

Yearly

Monthly (/ 12)

(6) Total Revenue

(7) Total COS/COGS/Variable Costs

(8) Gross Profit Required (6-7) & Percentage

(9) Total Expenses/Overheads

(10) Net Profit (8-9)

Personal Achievements

What did you achieve personally in the last 12 months? What areas weren't you satisfied with?

Health & Exercise

Family/Partner

Fun & Leisure

Wealth & Finances

Learning & Development

Travel

Special & Other

5–10 Year Goals

It is 2030 (5–10 years time) and my life looks and feels like:

Wealth:

Property/Home:

Family/Partner:

Possessions:

Business:

Travel/Holidays:

Charity/Donations/Community:

Other:

1 Year Goals

It is 2023 (1 year's time) and I am on track to achieving my 3-year goals because:

Wealth:

Property/Home:

Family/Partner:

Possessions:

[illegible][illegible]

We Guarantee results, and that you'll be able to "Find our Fee" in your business within 17 weeks of **ActionCOACH** coaching your company or your coaching is **FREE!**

1. **We Guarantee** to tell the truth about you and your business no matter how uncomfortable it may be, or how hard it is to share with you the realities of your business and the changes you need to make.
2. **We Guarantee** you a "business re-education" that shows how your business really works and how to successfully grow your company as well as how to apply your new knowledge to any business situation.
3. **We Guarantee** complete confidentiality.
4. **We Guarantee** a personalized approach to your business.
5. **We Guarantee** a proven system and methodology that is designed to multiply profits in your business, with complete access to our proprietary system of coaching strategies, systems, programs, and services.
6. **We Guarantee** to show you how **ActionCOACH** defines business success, and how to build a commercial, profitable enterprise that works without you.



Michael Conner
Certified Business Coach
770.655.9803
michaelconner@actioncoach.com

GLOBAL HEADQUARTERS

5781 S. Fort Apache Rd
Las Vegas, Nevada 89148, USA

P: +1 (702) 795 3188

E: info@actioncoach.com