

BOARDROOM

Fall 2021 Retreat

Notes:

Insights & Actions Summary

Welcome + Effortless Business	Insight:	Insight:	Insight:
	Action:	Action:	Action:
Making Better Strategic Decisions	Insight:	Insight:	Insight:
	Action:	Action:	Action:
Cash Flow	Insight:	Insight:	Insight:
	Action:	Action:	Action:

Insights & Actions Summary

Selling Strategy	Insight:	Insight:	Insight:
	Action:	Action:	Action:
Measuring What Matters	Insight:	Insight:	Insight:
	Action:	Action:	Action:
Marketing Your Biz: What's Working Now	Insight:	Insight:	Insight:
	Action:	Action:	Action:

Insights & Actions Summary

<div>“Gateway” Actions for your Top 2 Projects</div>	<div>Project:</div>	<div>Project:</div>
	<div>Gateway Actions:</div>	<div>Gateway Actions:</div>

Notes:

Why Does It Feel So Difficult?

What would I like to be different about my business by this time next year?

What makes my business challenging, frustrating or exhausting? What about it makes it feel like I'm pushing a boulder uphill?

Why do these challenges feel unsolvable?

Why Does It Feel So Difficult?

Describe the story I'm telling myself about these challenges?

What if this was mostly based on one or more limiting beliefs I'm harboring? What could those limiting beliefs be?

What if it were *easy*? What if the solution were simpler than I'm making it out to be? What if there was another (better!) way I'm not thinking about?

Escape the Overwhelm Trap

Raise Fees

Let Go of the Bottom

Schedule Non-negotiable Free days

Improve Cash Flow Management

Escape the Overwhelm Trap

Transition Existing Commitments

Hire Help

Change Your Model

Other

Notes:

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Notes:

My 6-Month Goals

It's April 30, 2022. What does my business look like? What great things have happened to me over the past 6 months? And how am I feeling about it?			
Income:	Clients:	Work:	Lifestyle:

My 90-Day Goals

It's January 31, 2022. I've had a pretty amazing run and had some great breakthroughs in my business.
What great things have happened over the past 90 days? How does that feel?

Income:

Clients:

Work:

Lifestyle:

**HOW TO MAKE
BETTER STRATEGIC
DECISIONS ABOUT
NEW OPPORTUNITIES**

Notes:

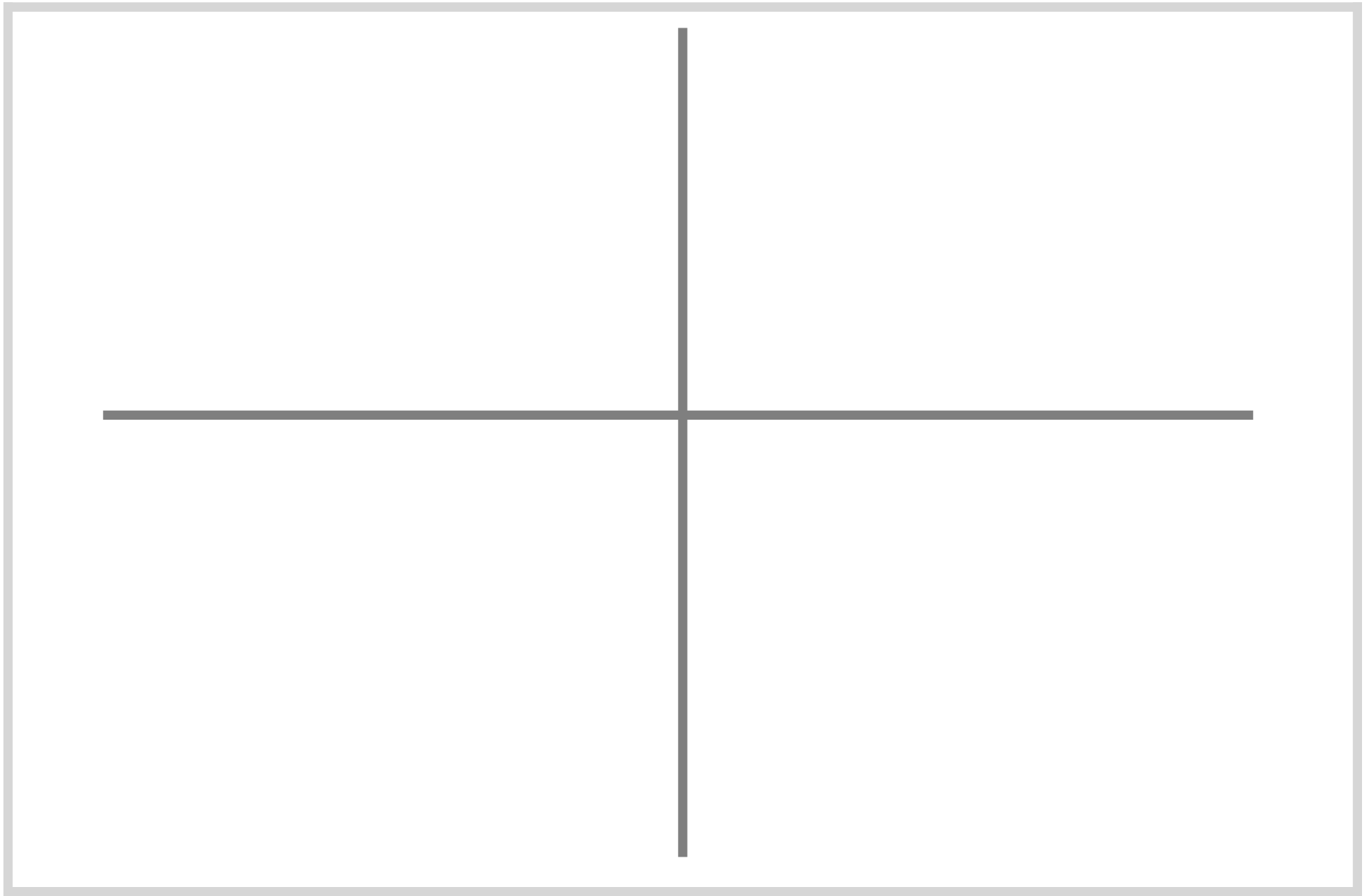
What Do You Value Most?

What do you value most in your business? Think in terms of income, clients, work and lifestyle.

What do you definitely **not want** in your business? What drives you crazy? What do you find soul-sucking?

Notes:

PCRQ Matrix



The LEE Test

Opportunity:

L:

E:

E:

Opportunity:

L:

E:

E:

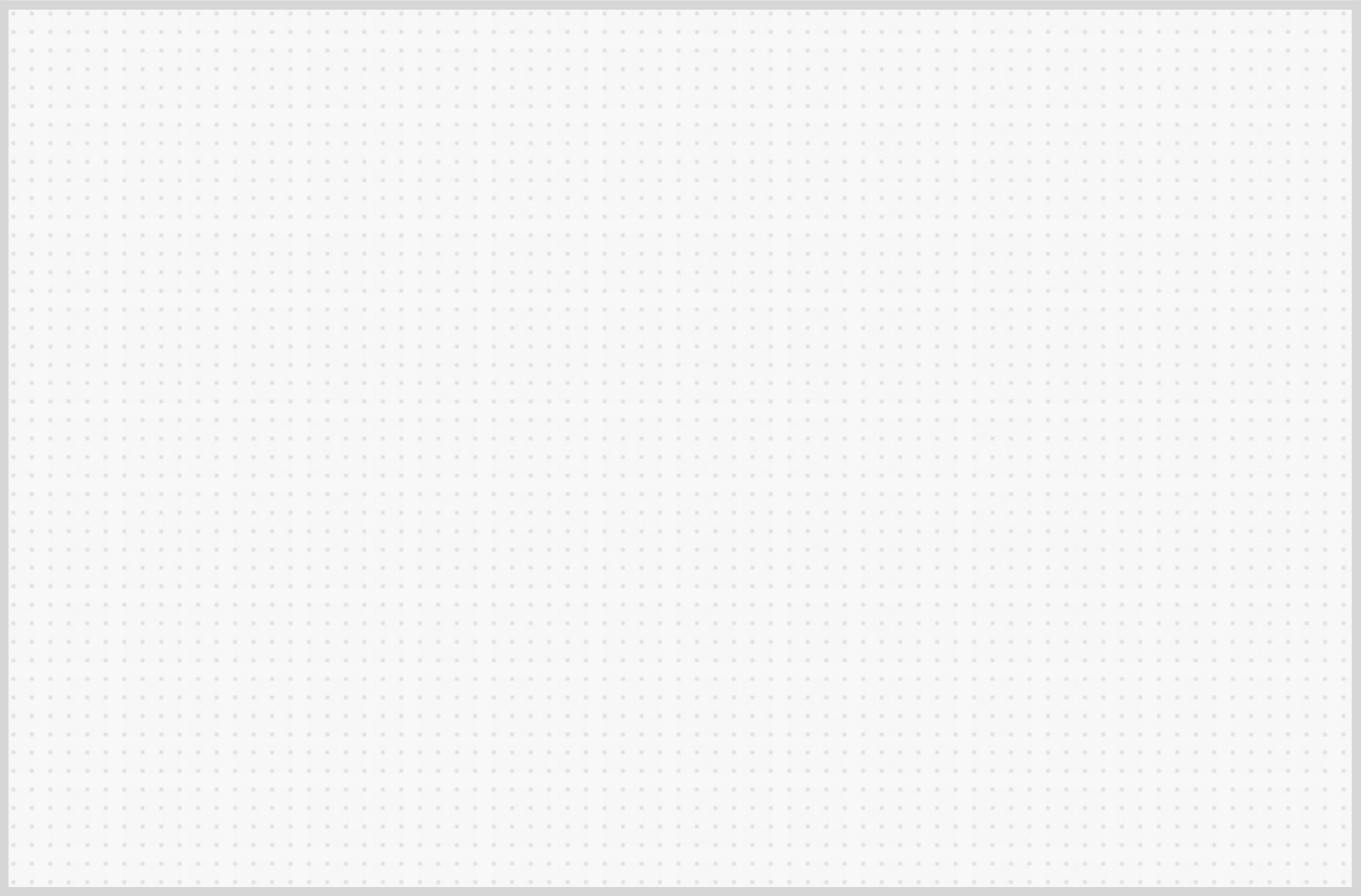
The Mixing Board

	-10	0	10
Business Model Fit			
Income Impact			
Risk/Reward Ratio			
Client/Partner Fit			
Work Desirability			
Impact on Lifestyle			
Impact on Stress			
Implementation Difficulty			
Excitement/Joy			
Impact on Non-negotiables			
Other: _____			
Other: _____			
Other: _____			

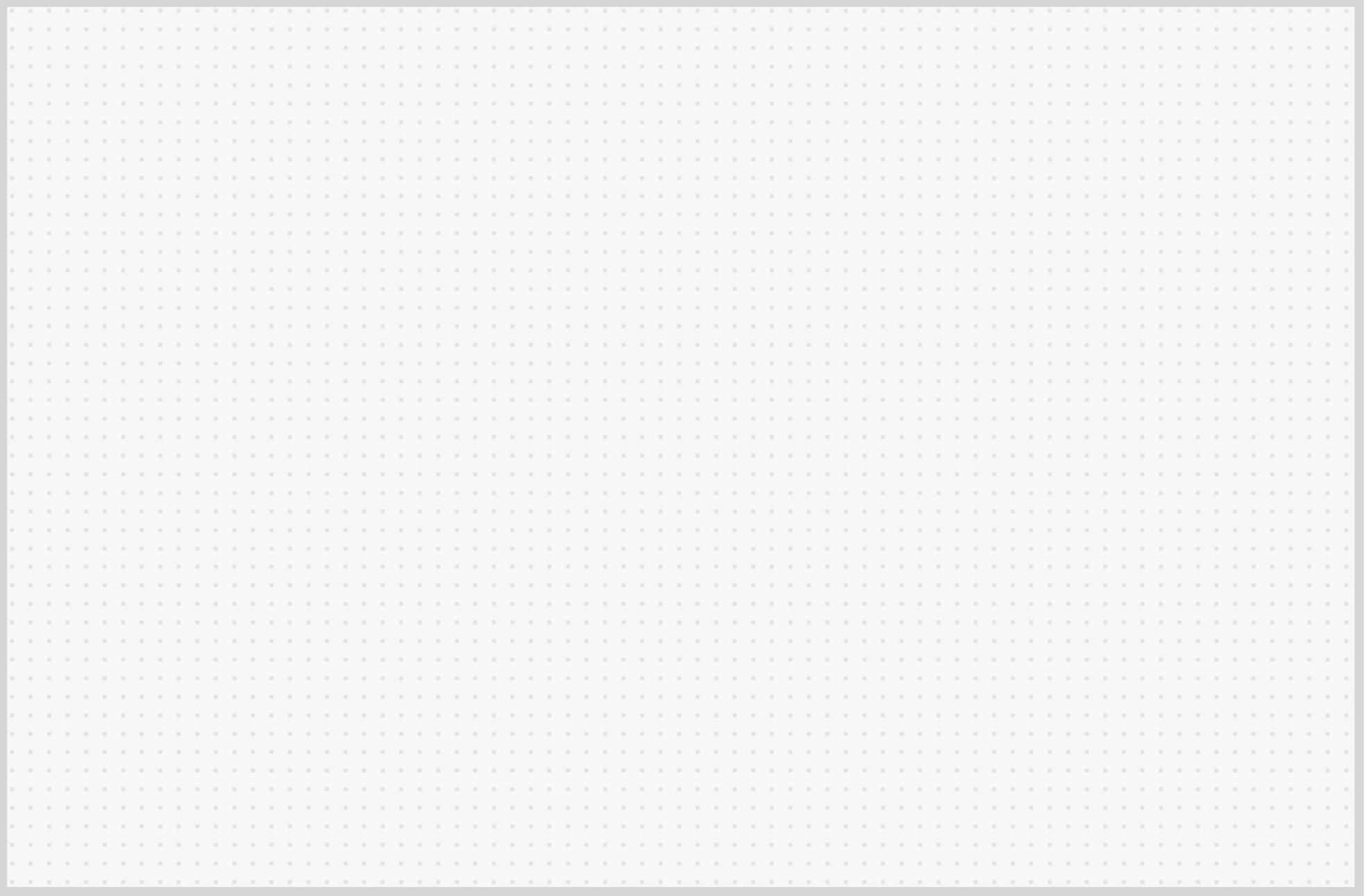
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Impact on Non-negotiables			
Other: _____			
Other: _____			
Other: _____			

Group Breakout Discussion & Insights



How to Say No Gracefully



Notes:

Notes:

CASH FLOW MANAGEMENT

Notes:

Notes:

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Notes:

Notes:

SELLING STRATEGY

Notes:

Notes:

Notes:

Notes:

Notes:

**MEASURING
WHAT MATTERS**

Notes:

Metric Categories + Ideas

Money Metrics

Work booked for next 90 days

Monthly cash flow

Accounts receivable

Months of cash in owner's comp account

Months of cash in OPEX account

Profit account balance (and/or balance growth trend)

Internal hourly rate (IHR) for the month

Internal hourly rate per client and/or per project worked on

Percentage of my monthly revenue that's recurring in nature

Client revenue proportion (% of revenue each client represents)

Subcontract writers: your own IHR multiplier on subcontracted work

Profitability of subcontracted work (revenue minus labor costs)

Joy Metrics

Number of free days

Number of buffer days

Number of fun activities

Bucket list (dreaming, planning, doing)

Monthly experiment

Tangible progress on side project(s)

Time spent on hobby (or days/afternoons dedicated to hobby)

Time spent serving my community

Date nights

Days out with the kids or partner

Client quality scores (based on 5 freedom triad factors)

Client multiplier scorecard (scores + trends)

Hours worked **on** the biz (% of total work hrs)

Stopped doing this month

Ongoing learning (e.g., books read, classes completed)

Your “Starter” List of Metrics

Money Metrics

Joy Metrics

Notes:

From Wish to Reality

Obvious:

Attractive:

Easy:

Satisfying:

Breakouts

What do you track now?

Is what you're tracking helpful? Not helpful? Why?

What tracking mechanism/format is working well for you?

What's missing from your current tracking?

Which metric ideas resonated w/ you the most? Which 3 did you pick?

How can you make this a habit?

Notes:

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**MARKETING YOUR BIZ:
WHAT'S WORKING
NOW?**

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Notes:

Notes:

Notes: