BOARDROOM

Fall 2021 Retreat

- N	lote	s:							 							 		 				 		-	 	 -
		-		-		 -			 		-					 	 	 		 		 			 	
		-			 -				 							 	 	 		 	 -	 			 	 -
									 							 		 		 		 			 	 -
																 	 	 		 		 			 	 - 1
									 							 					 -		-		 	-
		-		-		 -			 		-					 		 		 	 -	 			 	 -
									 							 						 			 	-
		-		-		 -			 		-					 	 	 		 		 			 	 -
									 							 		 			 -	 	-		 	 -
		-		-					 		-					 	 	 		 	 -	 			 	
			-	-					-		-				-	 		 -			 -			-	 	 -
		-		-					 									 		 		 			 	
									 				-			 	 	 		 		 			 	
				-	 -				 		- 1		-			 	 	 		 	 -	 			 	 -
					 -				 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -		 -		 		-		-			 	 	 		 		 		-	 	 -



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

	Insight:	Insight:	Insight:
Selling Strategy			
	Action:	Action:	Action:
			14 1004 1004 14 1004 1
Measuring What Matters	Insight:	Insight:	Insight:
	Action:	Action:	Action:
	Insight:	Insight:	Insight:
Marketing Your Biz: What's Working Now			
	Action:	Action:	Action:



Insights & Actions Summary

	Project:	Project:
	Gateway Actions:	Gateway Actions:
"Gateway" Actions for		
dateway Actions to		
"Gateway" Actions for your Top 2 Projects		



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -	 -				 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 	-		 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	 -
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 		-	 	 -



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 <i>easy</i> ? 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?
	es notes notes to a notes tes est	
	TO CASTO CASTORIO CASTO CASTORIO CAS	CO EDUCAT EXCEDITED EXCED EXCEDITED EXC



Escape the Overwhelm Trap

												-																														
Raise	Fee	es -																	Le	et (30	of	th	e E	3o ⁻	tto	m															 -
1.0																-		-																								
																-																										
														-		-					-																	-				
													- 1			-		-																								 -
													- 1			-					-			-					-									-				
													- 1	-		-				1	-		1													- 1						
								-					- 1			-					-																	-				-
														-		-							1					1													1	
	-												-					-																								
														-		-					-			•																		
											1					-							1					1			1			 1								
				-			-							-		-										-							-							-		
														-		-					-			•																		
																-							1														1					
													- 1			-					-																					
																-																					1					
Cohodi	ulo	No	n n	000	tioh	ا ما	-ro	o d	lov		1				:		i		lm	201	0)/	·	`.	oh		O14		10,	201	201	~	nt	÷		÷							
Sched	ule	No	n-n	ego	tiab	le l	=re	e d	lay	'S	1				:		:		lm	npr	ov	е (Ca	sh	FI	ΟW	/ N	1ar	าลงุ	ger	ne	nt			-			:				
Sched	ule	No	n-n	ego	tiab	le I	=re	e d	lay	'S					-		-		lm	npr	ov	е (Са	sh	FI	OW	/ N	1ar	าลดู	ger	ne	nt			-			:				
Sched	ule	No	n-n	ego	tiab	le I	=re	e d	lay	rs					-				lm	npr	ov	е (Ca	sh	FI	OW	/ N	1ar	าลดู	ger	ne	nt	-		-							
Sched	ule	No	n-n	ego	tiab	ole l	=re	e d	lay	'S									lm	npr	ov	е (Ca	sh	FI	OW	/ N	1ar	าลดู	ger	ne	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs									lm	npr	ov	e (Са	sh	FI	OW	/ N	1ar	าลงุ	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs									lm	npr	ov	е (Ca	sh	FI	OW	/ N	1ar	าลดุ	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs									lm	npr	ov	е (Ca	sh	FI	OW	/ №	lar	าลงุ	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs									lm	npr	ov	е (Ca	sh	FI	OW	/ N	lar	าลงุ	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs									Im	npr	ov	e (Ca	sh	·FI	ow	/ M	lar	าลดู	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole l	=re	e d	lay	rs									lm	npr	ov	e (Ca	sh	·FI	ow	/ M	laı	າລຸ	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs.									lm	npr	ov	re (Ca	sh	·FI	OW	/ M	1ar	naç	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	le I	=re	e d	lay	rs .									lm	npr	ov	e (Ca	sh	·FI	OW	/ N	1ar	าลงุ	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs .									lm	npr	ov	e (Ca	sh	FI	ow	/ N	laı	na	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	ole I	=re	e d	lay	rs .									lm	npr	ov	e (Ca	sh	FI	ow	/ N	1ar	naç	ger	me	nt										
Sched	ule	No	n-n	ego	tiab	le I	=re	e d	lay	rs									lm	npr	ov	re (Ca	sh	FI	ow	/ N	lar	na(ger	me	ent										
Sched	ule	No	n-n	ego	tiab	le I	=re	e d	lay	r's									lm	npr	ov	re (Ca	sh	-FI	OW	/ N	laı	na(ger	me	ent										
Sched	ule	No	n-n	egot	tiab	le I	=re	e d	lay	r'S									lm	npr	ov	e (Ca	sh	FI	OW	/ N	1aı	naç	ger	me	ent										
Sched	ule	No	n-n	egot	tiab	le I	=re	e d	lay	rs .									lm	npr	ov	e (Ca	sh	FI	ow	/ N	1aı	naç	ger	me	ent										
Sched	ule	No	n-n	egot	tiab	ile I	=re	e d	lay	rs .									lm	npr	ov	re (Ca	sh	FI	ow	/ IV	lar	naç	ger	me	ent										
Sched	ule	No	n-n	egot	tiab	ile I	=re	e d	lay	rs .									lm	npr	ov	re (Ca	sh	FI	ow	, N	lar	naç	ger	me	ent										
Sched	ule	No	n-n	ego	tiab	le I	=re	e d	lay	rs									lm	npr	ov	e (Ca	sh	-FI	OW	/ N	1aı	naç	ger	me	ent										



Escape the Overwhelm Trap

Transition Existing Commitments		Hire Help
	A TALL STREET STREET, STREET STREET	
Change Your Model	a hada in anthera hada in anthera	Other
	FIRST CALCULATION OF STREET	
	a local enteriors enteriors have enteriors	



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -	 -				 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 	-		 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	 -
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 		-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -					 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 	-		 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	 -
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	otes	3:				 			 		 		 	 	 		 	 		 		 	 	
																			-					
						 			 		 		 	 	 -		 	 				 		
						 			 		 		 	 	 	-	 	 		 		 	 	
													 	 				 		 				111
						 			 					 	 			 		 		 		- 1
						 			 		 		 	 	 	-	 	 		 		 	 	
				 		 			 		 		 	 	 	-	 	 		 		 	 	
			-			 			 		 	-	 	 	 	-	 	 		 		 		
	-		-	 		 			 	-			 	 	 		 	 		 		 	 	



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: Lifes	It's April 20, 2022. What does my bus	singer look like? What great things have been and to me over the past 6 month	ho?
	And how am I feeling about it?	siness rook like? What great things have happened to the over the past o month	115 f
Income: Clients: Work: Lifestyle: Clients: Work: Lifestyle: Clients: Client	7.11.4		
Income: Clients: Work: Lifestyle:			
Income: Clients: Work: Lifestyle:			
	Income:	Clients: Work:	Lifestyle:



My 90-Day Goals

It's January 21, 2022, I've had a protty	amazing run and had come groat broakthroughe in my business	
What great things have happened over	amazing run and had some great breakthroughs in my business. er the past 90 days? How does that feel?	
Income:	Clients: Work:	Lifestyle:
	m nom nomba nom ne m nom nomba nom ne	



HOW TO MAKE BETTER STRATEGIC DECISIONS ABOUT NEW OPPORTUNITIES

- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -					 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-		 -				 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 			 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	 -
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 	 -	 	1.0	-	 	 -



What Do You Value Most?

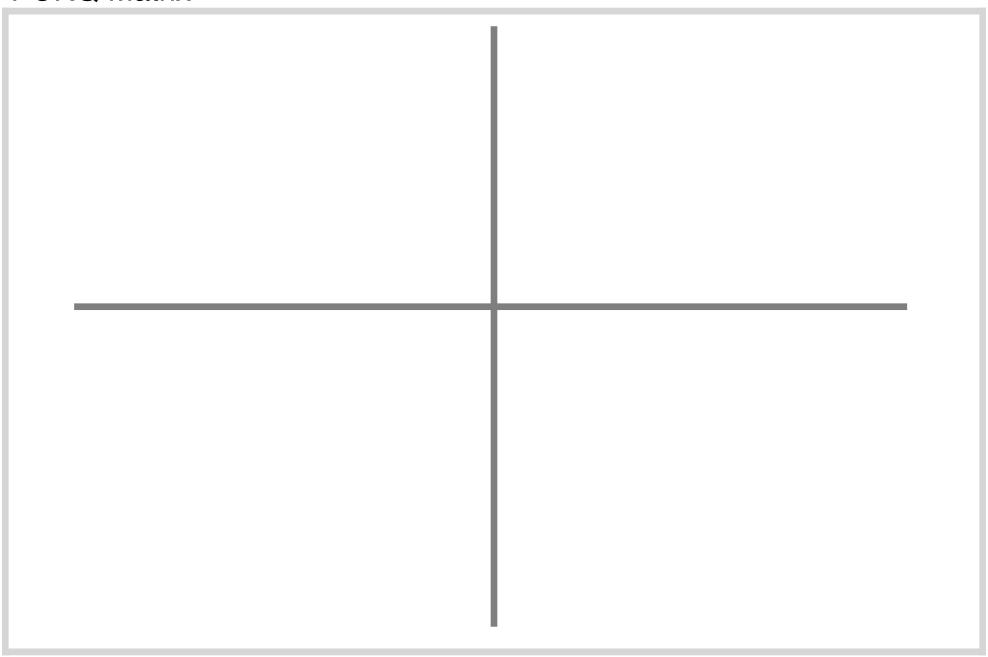
What do you value most in your business? Think in terms of income, clients, work and lifestyle.	What do you definitely not want in your business? What drives you crazy? What do you find soul-sucking?



- N	lote	21		 						 				 				 			 		 	
''	iOiC.	٥.																						
							-	 		 	-	 		 		 		 	 	 	 		 	
		-						 		 		 		 				 	 	 	 		 	
										 		-		 			-	 			 			
						1 1	-	 		 	-	 		 		 		 	 	 	 	1. 1	 	
								 		 	-	 		 		 		 	 	 	 		 	
								 		 	-	 		 	 	 		 	 	 	 		 	 100
										 	-			 					 	 	 		 	
								 		 	-	 		 	 	 		 	 	 	 		 	
										 	-	 -		 				 	 		 			
								 		 	-	 		 		 		 	 	 	 		 	
								 		 		 -		 				 	 				 	
								 		 	-	 		 	 	 		 	 	 	 		 	
								 		 		 		 				 	 		 	-	 	
								 		 	-	 		 	 	 		 	 	 	 		 	 2.5.4
								 		 	-	 		 	 	 		 	 	 	 		 	
								 		 	-	 		 	 	 		 	 	 	 		 	
										 	-			 					 	 	 		 	
								 		 	-	 		 	 	 		 	 	 	 		 	
					- 1		-	 	-	 		 		 	 			 	 	 	 -		 	
							-	 		 		 		 				 	 		 		 	



PCRQ Matrix





The LEE Test

Opportunity:	
L:	
: E :::::::::::::::::::::::::::::::::::	
E:	
Opportunity:	
-E:	
E:	
	 1111

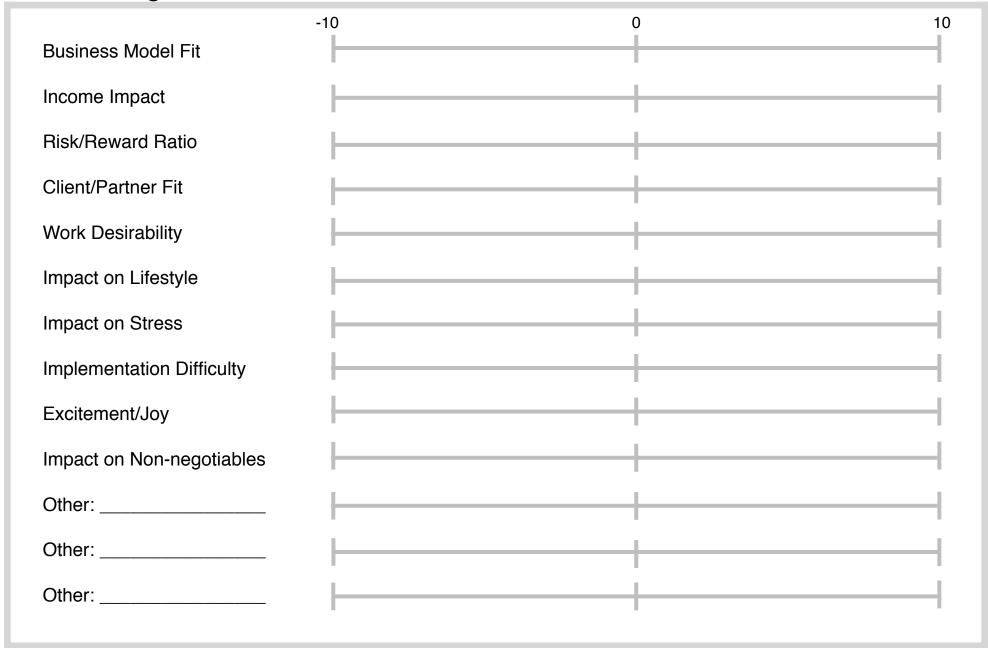


The Mixing Board





The Mixing Board





Group Breakout Discussion & Insights



How to Say No Gracefully



- N	lote	s:								 							 		 				 		-	 	 -
		-		-						 		-					 	 	 		 		 			 	
		-			 -	 -				 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 			 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 	 -	 	1.0	-	 	 -



- N	lote	s:							 							 		 				 		-	 	 -
		-		-					 		-					 	 	 		 		 			 	
		-			 -	 -			 							 	 	 		 	 -	 			 	 -
									 							 		 		 		 			 	 -
																 	 	 		 		 			 	 - 1
									 							 					 -		-		 	-
		-		-		 -			 		-					 		 		 	 -	 			 	 -
									 							 						 			 	-
		-		-					 		-					 	 	 		 		 			 	 -
									 							 		 			 -	 	-		 	 -
		-		-					 		-					 		 		 	 -	 			 	
			-	-					-		-				-	 		 -			 -			-	 	
		-		-					 									 		 		 			 	
									 				-			 	 	 		 		 			 	
				-	 -				 		- 1		-			 	 	 		 	 -	 			 	 -
					 -				 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -		 -		 		-		-			 	 	 		 	 -	 	1.0	-	 	 -



CASH FLOW MANAGEMENT

- N	lote	s:							 							 		 				 		-	 	 -
		-		-		 -			 		-					 	 	 		 		 			 	
		-			 -				 							 	 	 		 	 -	 			 	 -
									 							 		 		 		 			 	 -
																 	 	 		 		 			 	 - 1
									 							 					 -		-		 	-
		-		-		 -			 		-					 		 		 	 -	 			 	 -
									 							 						 			 	-
		-		-					 		-					 	 	 		 		 			 	 -
									 							 		 			 -	 	-		 	 -
		-		-					 		-					 		 		 	 -	 			 	
			-	-					-		-				-	 		 -			 -			-	 	
		-		-					 									 		 		 			 	
									 				-			 	 	 		 		 			 	
				-	 -				 		- 1		-			 	 	 		 	 -	 			 	 -
					 -				 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -		 -		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -					 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 		 		 		 			 	 -
										 							 		 			 -	 	-		 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -					 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 	-		 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:					 			 		 	-			 	 		 		 	 -		 		
					-																				-	
				-		-	 		-	 		 				 	 		 		 				 -	
				-		-	 		-	 		 				 	 		 		 	 		 		
				-			 			 		 				 	 		 		 	 				
							 		-	 						 	 		 		 	 			 	
				-						 		 				 			 					 	 -	
				-			 		-	 		 				 	 		 		 	 			 	
					-								-			 			 			-	100	 		
				-		-	 			 		 				 	 				 			 	 	
						-	 		-	 		 				 	 		 		 	 		 		
			 -			-	 		-	 	-	 		-		 	 		 		 	 			 -	



- N	lote	s:						 			 		 	-			 	 		 		 	 -		 		
			-			-																				-	
					-		-	 		-	 		 				 	 		 		 				 -	
							-	 			 		 				 	 		 		 	 		 		
					-		-	 		-	 		 				 	 		 		 	 		 		
					-			 			 		 				 	 		 		 	 				
								 		-	 						 	 		 		 	 			 	
					-						 		 				 			 					 	 -	
					-			 		-	 						 	 		 		 	 			 	
						-								-			 			 			-	100	 		
					-		-	 			 		 				 	 				 			 	 	
							-	 			 		 				 	 		 		 	 		 		
				-			-	 		-	 	-	 		-		 	 		 		 	 			 -	



SELLING STRATEGY

- N	lote	s:						 			 		 	-			 	 		 		 	 -		 		
			-			-																				-	
					-		-	 		-	 		 				 	 		 		 				 -	
							-	 			 		 				 	 		 		 	 		 		
					-		-	 		-	 		 				 	 		 		 	 		 		
					-			 			 		 				 	 		 		 	 				
								 		-	 		 				 	 		 		 	 			 	
					-						 		 				 			 					 	 -	
					-			 		-	 						 	 		 		 	 			 	
						-								-			 			 			-	100	 		
					-		-	 			 		 				 	 				 			 	 	
							-	 			 		 				 	 		 		 	 		 		
				-			-	 		-	 	-	 		-		 	 		 		 	 			 -	



- N	lote	s:							 							 		 				 		-	 	 -
		-		-					 		-					 	 	 		 		 			 	
		-			 -	 -			 							 	 	 		 	 -	 			 	 -
									 							 		 		 		 			 	 -
																 	 	 		 		 			 	 - 1
									 							 							-		 	-
		-		-		 -			 		-					 		 		 	 -	 			 	 -
									 							 						 			 	-
		-		-					 		-					 		 		 		 			 	 -
									 							 		 			 -	 	-		 	 -
		-		-					 		-					 	 	 		 	 -	 			 	
			-	-					 -		-				-	 		 -			 -			-	 	
		-		-					 									 		 		 			 	
									 				-			 	 	 		 		 			 	
				-	 -				 		- 1		-			 	 	 		 	 -	 			 	 -
					 -				 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -		 -		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -					 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 	-		 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -	 -				 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 							-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 			 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -	 -				 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-		 -				 		-					 		 		 		 			 	 -
										 							 		 			 -	 			 	 -
		-		-						 		-					 	 	 		 	 -	 			 	
			-	-						-		-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



MEASURING WHAT MATTERS

- N	otes	3:				 			 		 		 	 	 		 	 	 	 		 	
						 			 		 		 	 	 -		 	 		 		 	
						 			 		 		 	 	 	-	 	 	 	 		 	
						 			 					 	 			 	 	 			- 1
						 			 		 		 	 	 	-	 	 	 	 		 	
				 		 			 		 		 	 	 	-	 	 	 	 		 	
			-			 			 		 	-	 	 	 	-	 	 	 	 		 	
	-		-	 		 			 	-			 	 	 		 	 1 1	 	 		 	



Metric Categories + Ideas

Money Metrics Joy Metrics Work booked for next 90 days Number of free days Monthly cash flow Number of buffer days Number of fun activities Months of cash in owner's comp account Bucket list (dreaming, planning, doing Months of cash in OPEX account Monthly experiment Profit account balance (and/or balance growth trend Tangible progress on side project(s) Internal hourly rate (IHR) for the month Time spent on hobby (or days/afternoons dedicated to hobby Internal hourly rate per client and/or per project worked or Time spent serving my community Percentage of my monthly revenue that's recurring in nature Date nights Client revenue proportion (% of revenue each client represents) Days out with the kids or partne Subcontract writers: your own IHR multiplier on subconracted work Client quality scores (based on 5 freedom triad factors Profitability of subcontracted work (revenue minus labor costs) 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

Mono	ey Metrics	 Joy Metrics
MOHE	y wellics	Joy Metrics



- N	otes	3:				 	 		 		 		 	 	 		 	 		 		 	 	
																			-					
						 			 		 		 	 	 -		 	 				 		
						 			 		 		 	 	 	-	 	 		 		 	 	
						 			 					 	 			 		 		 		- 1
						 			 		 		 	 	 	-	 	 		 		 	 	
				 		 			 		 		 	 	 	-	 	 		 		 	 	
			-			 			 		 	-	 	 	 	-	 	 		 		 		
	-		-	 		 			 	-			 	 	 		 	 1 1		 		 	 	



From Wish to Reality

Obvious:	
Attractive:	
_	
Easy:	
Satisfying:	



Breakouts

What do you track now?		11				: :			::		11		11		1
				: :	: :				: :		: :				-
															1
				: :	1.	: :			: :		: :				
Is what you're tracking helpful? Not helpful? Why?															-
									::						1
				: :					: :		: :				
What tracking mechanism/format is working well for you?															1
What tracking mechanism/format is working well for you!	100														
															-
What's missing from your current tracking?															
					11										-
Which metric ideas resonated w/ you the most? Which 3 c	lid you	ı pick	?					11					11		
	: : :			: :	1.1						: :				-
								11					11		
	: : :			: :	: :						: :	: : :			-
How can you make this a habit?					: :			: :	: :						-
now can you make this a habit?															-
							 		: :	 	: :			 	-



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -	 -				 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 			 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-								-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -	 -				 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 							-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 	 	 		 		 			 	 -
										 							 		 			 -	 			 	 -
		-		-						 		-					 		 		 	 -	 			 	
			-	-								-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



- N	lote	s:								 							 		 				 		-	 	 -
		-		-		 -				 		-					 	 	 		 		 			 	
		-			 -					 							 	 	 		 	 -	 			 	 -
										 							 		 		 		 			 	 -
																	 	 	 		 		 			 	 - 1
							-			 							 					 -		-		 	-
		-		-		 -				 		-					 		 		 	 -	 			 	 -
										 							 						 			 	-
		-		-						 		-					 		 		 		 			 	 -
										 							 		 			 -	 			 	 -
		-		-						 		-					 	 	 		 	 -	 			 	
			-	-								-				-	 		 -			 -			-	 	
		-		-						 									 		 		 			 	
										 				-			 	 	 		 		 			 	
				-	 -					 		- 1		-			 	 	 		 	 -	 			 	 -
					 -					 		- 1			 -		 		 	 -	 	 -	 		-	 	 -
					 -			-		 		-		-			 	 	 		 		 	1.0	-	 	 -



MARKETING YOUR BIZ: WHAT'S WORKING NOW?

- N	lote	s:						 			 		 	-			 	 		 		 	 -		 		
			-			-																				-	
					-		-	 		-	 		 				 	 		 		 				 -	
							-	 			 		 				 	 		 		 	 		 		
					-		-	 		-	 		 				 	 		 		 	 		 		
					-			 			 		 				 	 		 		 	 				
								 		-	 						 	 		 		 	 			 	
					-						 		 				 			 					 	 -	
					-			 		-	 						 	 		 		 	 			 	
						-								-			 			 			-	100	 		
					-		-	 			 		 				 	 				 			 	 	
							-	 			 		 				 	 		 		 	 		 		
				-			-	 		-	 	-	 		-		 	 		 		 	 			 -	



- N	lote	s:						 			 		 	-			 	 		 		 	 -		 		
			-			-																				-	
					-		-	 		-	 		 				 	 		 		 				 -	
					-		-	 		-	 		 				 	 		 		 	 		 		
					-			 			 		 				 	 		 		 	 				
								 		-	 		 				 	 		 		 	 			 	
					-						 		 				 			 					 	 -	
					-			 		-	 						 	 		 		 	 			 	
						-								-			 			 			-	100	 		
					-		-	 			 		 				 	 				 			 	 	
							-	 			 		 				 	 		 		 	 		 		
				-			-	 		-	 	-	 		-		 	 		 		 	 			 -	



- N	lote	s:						 			 		 	-			 	 		 		 	 -		 		
			-			-																				-	
					-		-	 		-	 		 				 	 		 		 				 -	
							-	 			 		 				 	 		 		 	 		 		
					-		-	 		-	 		 				 	 		 		 	 		 		
					-			 			 		 				 	 		 		 	 				
								 		-	 						 	 		 		 	 			 	
					-						 		 				 			 					 	 -	
					-			 		-	 						 	 		 		 	 			 	
						-								-			 			 			-	100	 		
					-		-	 			 		 				 	 				 			 	 	
							-	 			 		 				 	 		 		 	 		 		
				-			-	 		-	 	-	 		-		 	 		 		 	 			 -	



- N	lote	s:					 			 		 	-			 	 		 		 	 -		 		
					-																				-	
				-		-	 		-	 		 				 	 		 		 				 -	
				-		-	 		-	 		 				 	 		 		 	 		 		
				-			 			 		 				 	 		 		 	 				
							 		-	 						 	 		 		 	 			 	
				-						 		 				 			 					 	 -	
				-			 		-	 						 	 		 		 	 			 	
					-								-			 			 			-	100	 		
				-		-	 			 		 				 	 				 			 	 	
						-	 			 		 				 	 		 		 	 		 		
			 -			-	 		-	 	-	 		-		 	 		 		 	 			 -	



- N	lote	s:					 			 		 	-			 	 		 		 	 -		 		
					-																				-	
				-		-	 		-	 		 				 	 		 		 				 -	
				-		-	 		-	 		 				 	 		 		 	 		 		
				-			 			 		 				 	 		 		 	 				
							 		-	 						 	 		 		 	 			 	
				-						 		 				 			 					 	 -	
				-			 		-	 						 	 		 		 	 			 	
					-								-			 			 			-	100	 		
				-		-	 			 		 				 	 				 			 	 	
						-	 			 		 				 	 		 		 	 		 		
			 -			-	 		-	 	-	 		-		 	 		 		 	 			 -	

