

Monthly Success Planner



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Introduction

My name is Mary Henderson. I am a mindset coach to entrepreneurs, I am an author and an entrepreneur.

There are 2 contributing factors to my success in business. One is my daily action planner and two is my personal growth.

This combination is, in my opinion a potent formula for success.

The planner you have your hands on resulted in building multi million dollar businesses and over achievement in my sales month on month and year on year.

To this very day, I follow this planner and honestly I can say that without a solid foundation, it is impossible to stay focused on building what I call the 'book of your life'. In other words, your dream life.

How To Use This Planner

The following pages are a template. Download the template and print 12 copies of it to use as a daily planner for the next 12 months. Then, take it to an office supplier and have it bound with a cover and back and make this your daily planner. All you need to do is fill in the gaps each month, week and day. That's it. Then at the end of each month, tally up your results. This is SO important because you will be able to see where your shortfall is and where you may require some additional resources.

There is on thing I have learned being in business. Simplify and Implement. It is as simple as that. Following a daily implementation running sheet means I am striving each day to achieve my goals. If I don't complete the tasks I have no-one else to blame but myself.

How To Use the Monthly Planner

The monthly planner is your high level goals for your business and personal development each month. I have divided the monthly planner into 2 sections.

Business Section Explained:

► **Monthly Financial Goal = E.g. \$20,000**

Define your monthly financial goal. What revenue are you striving to achieve in that month.

► **Average Sales Price = E.g. \$5,000**

Define Your Average Sale Price Based on Your Products/Services. If you are a coach and your coaching fee is \$5,000 then you will write it in this section.

► **Average Sales Required Per Month To Achieve Monthly Goal = E.g. 4**

In order to meet your monthly financial goal, divide your monthly financial goal by your average sales price. Example $\$20,000 / \$5,000 = 4$ Sales

► **Sales Conversion (based on your past) = e.g. 25%**

Based on your past experience, what is your conversion rate. Do you close 1 in 4 sales calls (25%), 2 in 4 sales calls (50%). Be honest and clear because this will define how many leads you need to generate in order to meet your financial goal.

► **Leads Required to Generate Required Monthly Sales: 16**

Using the example above, how many leads will you need to generate to close the average sales per month. Let's use the example 4 sales, your conversion is 1 in 4 (25%) so you will need to multiply 4 sales by 4 leads to meet your monthly financial goal. In this case, you would have to generate 16 leads.

► **5 Tasks to Guarantee # of Leads:**

What tasks do you need to generate that will guarantee you the total leads you need to close the total amount of monthly sales to meet your financial goal. Example – Do a JV, Run FB ads, Get referrals, Do a keynote.

► **5 Traits To Guarantee Tasks:**

What traits will you have to implement this month in order to achieve these goals? Example – Tenacious, Productive, Time Management, Delegate, Compassion.

Mindset Section Explained:

► **What Are My Non-Negotiable Goals This Month**

In this section, you must articulate your purpose this month. Why are you doing what you are doing? Write a one paragraph under each section that represents your life and write it as though you have achieved this. Get into the feeling and make it as real as you can.

WEALTH, HEALTH, FAMILY, CAREER, FRIENDS, PERSONAL DEVELOPMENT

► **What emotional blocker will I work on this month?**

You can be guaranteed that whatever is holding your back from achieving peak performance is an emotional blocker.

It is so important to come face to face with this emotional trigger. If you call this emotion FEAR, then break it down. What am I fearing? Failure, Success, Judgment, Shame??? Write it as the label you most often use.

In your daily planner, one of the mindset goals is to do a 15 minute breathing exercise and invite the emotion to join you. When you come face to face with your emotional trigger, you are NOT feeding the part of you (The EGO SELF) with the fuel it require to keep you stuck. In this daily exercise, you are not numbing the pain but rather embracing it and freeing it by feeding it less and less each day until it no longer is a memory held in your body.

► What Traits Do I Require To Practise This Month

This ties back to your daily tasks. If you need to be tenacious and fight for that pitch you have been working on for the last 8 weeks, then learn the trait you need to have this month to win. If you need to say no to people that are distracting you then learn that trait if it means achieving your goal. We have to remember we all have traits that we acquired as we were growing up that may not be serving us as adults. Learn the traits you need in order to become the best version of yourself.

► What Is My Note To Myself This Month?

Some people would call this affirmation, but I don't. I call it note to self. Write a note something that is positive or triggers you each day to remember why you want to achieve your success this month. I have learned the art of writing stories. One way that is really magical is to write it in the form of a question. Example – Why Do I over achieve my sales targets each month? Why Do I always meet the right clients at the right time each month? When you write a note to yourself in the form of questions, the brain will try and find an answer and this is when creativity starts to happen? If the brain does not have an image or experience to match the question, it will work overtime to find an answer. I love this part of the process. There really is magic in this part of the planner.

► What Am I Grateful For?

I know this is so cliché but it is a must. Write down really what you are grateful for because when you write it, you have a much bigger WHY to achieve your monthly goals. List at least 3 things each month you are grateful for and feel it in your heart.

Monthly Planner for Success

Month: _____

Business

Monthly Financial Goal

Average Sales Price

Average Sales Per Month

Sales Conversion %

Leads Required

5 tasks to guarantee the number of leads

1. _____
2. _____
3. _____
4. _____
5. _____

5 traits I need in order to meet the tasks

1. _____
2. _____
3. _____
4. _____
5. _____

Month: _____

Mindset

What are my non-negotiable goals?

Wealth:

Health:

Family:

Career:

Friends:

Personal Development:

What emotional block will I acknowledge and work with this month?

What traits do I need to learn and practise in order to meet my daily tasks?

What am I grateful for?

1. _____
2. _____
3. _____
4. _____
5. _____

Weekly Success Planner

W/C: _____

Business

Weekly Financial Goal (Divide Monthly Goal by 4)

eg. Monthly goal = \$20k, Weekly goal = \$5k

Average Sales Price (Same as monthly)

Average Sales Per Week

Sales Conversion % (Same as monthly)

Leads Required (Divide total monthly leads by 4)

5 tasks to guarantee the number of leads this week

1. _____
2. _____
3. _____
4. _____
5. _____

5 traits I need in order to meet the tasks this week

1. _____
2. _____
3. _____
4. _____
5. _____

W/C: _____

Mindset**What is the most important goal for me this week?**

(Please elaborate)

Wealth:

Health:

Family:

Career:

Friends:

Personal Development:

What emotional block will I acknowledge and work with each day this week?**What traits do I need to learn and practise in order to meet my daily tasks?****What am I grateful for this week?**

1. _____
2. _____
3. _____
4. _____
5. _____

Daily Planner

Day: _____

Date: _____

AM

0600.....

0700.....

0800.....

0900.....

1000.....

1100.....

1200.....

PM

1:00.....

2:00.....

3:00.....

4:00.....

5:00.....

6:00.....

7:00.....

8:00.....

9:00.....

Uncompleted to-do items (list)	New Date of Completion
1.	
2.	
3.	

Day: _____

Date: _____

Daily Business ToDo List

Sales Leads

Conversions

5 Tasks For Today

1.

2.

3.

4.

5.

Traits For Today

.....

.....

Daily Mindset ToDo List

Completed the 15 Minute Emotional Trigger Release Breathing Exercise Y/N ☐

Note to Self

.....

.....

Main Goal I want to Focus on Today

.....

.....

What am I grateful for Today

.....

.....

On a Scale of 1 - 10 (10 = very happy), how happy were you with your achievement today?

End of Month Actual Achievements

Business Goals	Result	Gap
Monthly Financial Goal		
Average Sales Price		
Average Sales I Achieved this Month		
What was my sales conversion %		
How many leads did I acquire		
Did I fulfill the 5 tasks to guarantee number of leads		
Did I implement 5 traits I needed in order to meet the tasks		

What did I learn this month?

What items do I need to implement next month?

On a Scale of 1 - 10 (10 = very happy), how happy were you with your achievement this month?

End of Month Actual Achievements

Mindset Goals	Result
Did I achieve the goals I set out for myself this month?	Wealth: Health: Family: Career: Friends: Personal Development:
Did I practise my daily breathing exercise to eliminate the emotional blocker that is holding me back from my peak performance?	Total number of days practised breathing exercise:
What traits did I consciously practise this month?	
What am I grateful for this month?	1. 2. 3. 4. 5.

Lessons learned this month

Items I need to implement next month

On a Scale of 1 - 10 (10 = very happy), how happy were you with your achievement this month?