



## Choose a Direction

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### Welcome to Step 1

It's a common misconception that planning means organizing the details first. But if you don't know what you want to achieve from the start, you won't know how to get there.

Deciding what you want to accomplish has two steps. First, you need to clarify your vision for your business. Second, you need to focus on how you'll use your business plan to achieve that vision. Do you want to scale? Expand your team? Spend fewer hours in the office? Sell the business further down the road?

Once you know where you're going, think about the smaller goals needed to help you move incrementally toward your vision.

After you complete this step, we'll send you a separate email with your answers to help you get started for next week.

*This step will take **about 5-10 minutes**.*

**Start Step 1**

## 2 Assess Your Business

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### Welcome to Step 2

It's time to get real about the current state of your business. Comparing where you are to what you want for the future will help you establish priorities and turn your plan into something that's achievable.

Evaluating your business from every angle doesn't require looking at every decision you made last year. Instead, you'll assess your business by answering questions in seven different categories: **Leadership, Finance, Management, Delivery, Sales, Marketing and Brand.**

Your scores will help you determine which core area of your business actually needs your attention. For example, it's easy to think that a decline in revenue means you need to increase sales. But, an increase in sales could be a temporary solution, especially if you find the problems are based in how you deliver to your customers, and not on how well you can sell your product or service.

## 3 Develop Your Priorities ✓ COMPLETED

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With your business assessment and vision in mind, you're ready to start outlining the details of your Annual Plan. You'll prioritize your goals to keep your plan concise and realistic.

Understanding how your goals will work together to complete your vision will ensure that you're using your time and resources efficiently. In this step, you'll complete a worksheet that will help you rank your priorities based on the results of your business assessment and compare those priorities with your vision for the future.

In Step 4, you'll use this completed worksheet to create an actionable list of projects and a roadmap for your goals. Remember to keep your answers from Step 1 and Step 2 close at hand. As you work through a list of priorities, you may need to stop and revise your vision to align more closely with your assessment.

If you've completed **Steps 1 and 2**, we'll resend your answers when you download the worksheet.

[Download Worksheet Again](#)

## 4 Create Goals

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Plans don't work unless they drill all the way down to day-to-day tasks. And while having a long list of things to do may seem like more work, your projects will be easier to understand and accomplish.

Many times people are unable to complete a project because they haven't defined the specific tasks necessary—and without an idea of what to do first, it's difficult to know where to start. Using your worksheet from Step 3, you'll review your priorities, create projects and organize your goals for the year.

Defining your projects starts with how you name them. Here are some tips to keep your projects fresh and interesting for your team:

### 1. Express the Purpose:

The name of the project should communicate the intended result. Try restating the goal in a shorter way. For example, the goal of "Increase Lead Conversion to 50%" could be achieved via the "Better Conversion Rate" Project or the "LC-50."

## 2. Communicate Depth:

You're going to be saying and looking at the project name a lot. Make it meaningful, intriguing and as exciting as possible. "Lead Generation" could become "Magnetizing the Market." Closing out the year's financials could be called, "Putting the Year to Bed." Interesting project names make for a lively culture and good conversation.

## 3. Be Functional:

Apple's project names became so interesting they became part of their brand. Most of us have heard "Snow Leopard" and "Mavericks," the names of their operating systems, but they use these catchy titles internally as well. "Road Warrior," for example, was their project name for the Powerbook 170. They might be fun, but you also need to evaluate how easy a project name is to follow and communicate.

You can use the same principles to help communicate your tasks. Remember, if you can't measure the progress made on a project, you should take a step back to reevaluate your tasks. Expressing purpose, communicating depth and functionality doesn't have to stop with your project name. Use the same principles to help clarify your tasks. A good way to check your projects is to make sure you can measure progress. If you can't, take another look at your tasks and see if you can break them down even more.

[Download Worksheet](#)

5

## Assign Accountabilities ✓ COMPLETED

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You can't be the driving force behind every detail. Without clear lines of communication, proper delegation and project management, your team won't have what they need to make progress.

In this Step, you'll designate "Project Leads," giving your team a single point of contact for questions, and build a roadmap with proposed deadlines to keep your projects on track.

Managing the technical details of your company will turn your projects and tasks into mountains of work—but designating "Project Leads" will help you keep your plan on track, and make space for you to work **ON** your business, not **IN** it.

Take a look at the worksheets you completed for **Step 4. Using your org chart and position agreements**, you'll connect an employee to a project and designate them as your Project Leader. They'll be directly responsible for organizing a team, delivering progress updates and addressing roadblocks. For example, if your Project Leader is your Sales Manager, they would assemble members from their department, delegate tasks and manage the daily work of the project.

Your Project Leader will hold their team accountable to a deadline and have an understanding of what it'll take to stay on target. In this way, you'll be creating a mechanism beyond simple 'due dates' and your Project Leaders will be held to higher standards.

While thinking about who should be responsible for each project, ask yourself:

1. Which employee has experience that relates to the results we want?
2. Will this employee clearly communicate expectations with their team?
3. Will this employee be honest with me about their progress and frustrations?
4. Is this project an opportunity for an employee to grow?

[Download Worksheet Again](#)

## Tips and Resources

Share your work with your team and create a system to "automate goal achievement" using [this blog post](#).

Organize your business around roles instead of people using our [Org Chart Guide](#).

Clarify your employees' roles and responsibilities using our [Position Agreement Guide](#).

Review your work with an EMyth Coach. Your first session is free, and there's no commitment to continue. [Talk with a Coach](#)

## 6 Add Flexibility

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As your knowledge and business grow, you'll want to remember why you made the strategic decisions you did. By documenting your assumptions and sharing them with your team, you'll add in flexibility to your plan so you don't have to start from scratch when something changes later on.

While you put the finishing touches on your Annual Plan, it's important to review your work with your team. Your employees understand the day-to-day technical work better than you do and will be the ones who put your plan into action. Without their input and feedback, you'll put yourself at a higher risk for your plan to go off course. As a general rule of thumb, the more involvement the better. If your team doesn't understand your plan, then they won't understand how to make it work. More often than not, they'll have ideas on how to improve your projects and can help validate your assumptions before the year begins.

Use this worksheet as a means to check-in with your team. Show them what you've learned, explain the decisions you've made and ask questions. Is your team excited? Or are they confused and weary? You'll need to work with them to bring energy into your plan—when they see your vision, they need to have the same passion as you do to make it come alive. Do they see how your plan will benefit them?

You won't always know the answers or have the best solutions—but when you involve your team, you're not only helping your plan, you're helping your employees to grow. You'll promote feedback, creativity and strategic thinking throughout your company, which will allow for a more inclusive atmosphere.

Throughout the year, you'll use your completed document to identify changes over time. You'll want to make copies, blank and completed, to share with your team. Review part or all of your plan when something significant changes; for example, a major competitor enters or leaves your market, an unexpected regulatory change, natural disasters, etc.

[Download Worksheet](#)

*Work alongside a key manager or employee to complete this worksheet before sharing with your team.*

## ⑥ Steps to GROW in 2017

# Step 1

What do you want to happen in 2017?

You have a whole year to do great things for yourself, and your business. Now's the time to write your ideas down and find your focus for the year. 2017's full of possibilities—so, what's possible for you?

In Step 1 of [Grow in 2017](#), you'll write a vision for the year ahead, and pick three main goals you want to accomplish with your plan.

[Get Started](#)

Need help getting started?

[Talk with a Coach](#)

Working with an EMyth Coach can help you clarify your goals and fast-track your Annual Plan. [Talk with a coach in a free session](#) to learn more about how we can help.

# ⑥ Steps to GROW in 2017

## Step 2

What's the current state of your business?

In **Step 2 of Grow in 2017**, you'll use our Business Assessment tool to score your business in seven core areas. You'll reflect on where you are today, how you'd like to improve, and find the areas where you have opportunities for growth.

[Get Started](#)

### Get Expert Help to Accomplish Your Goals in 2017

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## ⑥ Steps to GROW in 2017

### Step 3

When it comes to the new year, it's easy to get caught in a flurry of ideas and projects for your business—but too many of them can lead your business in conflicting directions.

In **Step 3 of Grow in 2017**, you'll prioritize your goals for the year to keep you focused on progress and minimize distractions.

[Get Started](#)

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## ⑥ Steps to GROW in 2017

### Step ④

Goals, projects, tasks—the key ingredients of an Annual Plan for your business. But how do you turn the plan you have on paper into a reality?

Often, business owners are unable to complete a project because they haven't specified the tasks necessary. In **Step 4 of Grow in 2017**, you'll define results, create realistic projects, and establish actionable tasks to help you reach your goals in the New Year.

[Get Started](#)

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# ⑥ Steps to GROW in 2017

## Step ⑤

Just because you own the business, doesn't mean you need to "own" all the projects as well. **In Step 5 of Grow in 2017**, you'll delegate work to key members of your team and create a roadmap to keep things on track.

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## ⑥ Steps to GROW in 2017

# Step 6

What do you do when things don't go according to plan?

In the final step of **Grow in 2017**, you'll get ready for all the surprises that 2017 may hold by building flexibility into your plan. With the support of your team, well-documented assumptions, and a formal review process, you'll be ready no matter what happens.

[Get Started](#)

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