



# MONDAY MOTIVATOR

CREATED BY PERFORMANCE STRATEGIES  
MANAGEMENT CONSULTING GROUP

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## Planning Ahead

It's Sunday evening and you're arriving at the airport international terminal 3 hours prior to departure. Your trip is going to be part business and part pleasure as you and your spouse think about the two weeks you're about to spend in Europe. You'll be visiting Paris, London, Madrid, Berlin and Rome during your trip. You have planned this trip for nearly three months and you're sure everything is in order.

You have planned ahead. Tickets, passports, medical and life directives, train passes for the Euro Rail, lodging, credit and debit cards, itinerary, clothes for both formal and casual needs as well as weather changes. You arranged for your house to be checked on, automatic light actuators, security arrangements, even a neighbor to water the plants once per week if needed. Is there anything you might have left out? How can you be sure? Having a nagging concern that you can't recall closing the garage door at 37,000 feet over the Atlantic Ocean is not good for your happy mood.



But what about the plane you're about to board? Who is in charge of that mega machine? How many moving parts are there? How many people are needed to make the flight safe, reliable and on time? Is there enough fuel? Do they have enough cocktails?

It's easy to overlook minor and sometimes more important details when planning major events. This is true for new product roll outs, management awards ceremonies, sales acknowledgement and training conferences and all the other events that make up your life,

both personal and professional. I've been a pilot for the past 40 years and have grown accustomed to using check lists before getting into any aircraft. This practice has come in handy for many other activities as well.

Take the next twelve months as one example. Our readers have requested more of that sort of focus. Since we are devoting some space to revisiting prior topics, this edition is devoted to **PLANNING**.

Do you need a checklist for everything you do? Not really, but one of the habits of successful people is planning ahead, and that requires making lists of considerations ahead of time so you are prepared. There are two ways to do this. One is paper and the other is our online, in the cloud, available on any device, goal setting software solution. Let's look at both of them more closely.


If you like paper versions of goal planning why not print this page and fill in the blanks below to give you a head start?

<b>WHAT I WANT FOR THE NEXT 12 MONTHS</b>	
<b>CAREER</b>	1.
	2.
	3.
<b>HEALTH</b>	1.
	2.
	3.
<b>MONEY</b>	1.
	2.
	3.
<b>RELATIONSHIPS</b>	1.
	2.
	3.
<b>COMMUNITY</b>	1.
	2.
	3.

Just thinking about what you want for the coming year does not have to be complicated. If you can name just three goals for each of these five categories shown, you'll be ahead of 85% of the people. The category of **COMMUNITY** can include your faith, neighborhood, city, state or even federal government. It can even mean a global scope of thinking.


Planning ahead takes into account what you need to do in order to succeed. You can add more detail about each answer you write down in the table above, but only after you have written the answers down. You're probably going to need many sheets of paper to write your planning down.

Our software solution takes your planning to a new level. It may start with a few sheets of paper but it ends up with a real-time, in your face, accountability and responsibility report as often as you want to log in and look at it. Here's a screen capture of my sample plan:




## Will Robertson's Plan

2017 Q1




Generate Printable Version
Select Quarter to View ▾
Hide Completed Goals

**Brand Purpose** ♥





Facilitate Leadership Commitment Through Organizational Systems





Exit


**Values** ♥

  
Direction

  
Vision

  
Agreement

  
Strategy

  
Action

**Blue Sky Vision** ♥

**Long Term Goals** ✔

Gross \$1M per year  
Learn Software Apps  
Create Branded Video Channel  
Create Workshop Series for 8 Topics  
Create Robust Marketing Campaigns  
Write and Publish 10 Books

**2017 Annual Goals** ✔

- On Track One NET client per month
- On Track Learn ACT-19
- On Track Create 12 PSI Videos
- On Track Create 2 Workshops for Sales and Management
- On Track Post and Distribute MM Via PS Web
- On Track Publish SBTPL and Managing The Box
- On Track Gross \$300K in 2017

**Client Sales Goals - 2017 Q1** ✔

- On Track Gross \$10K per month in Q-1
- On Track Close 1 New Client Per Month @\$5kX3+AF

**In-house Workshops Goals - 2017 Q1** ✔

- On Track Do the outline for SBTPL by March 30th

**Learning / Study Goals - 2017 Q1** ✔

- On Track Buy, Install, Tutorials for ACT-19

**Marketing Goals - 2017 Q1** ✔

- On Track Study Back Office with Lee Each Week

**Video Goals - 2017 Q1** ✔

- On Track Create V-01 by March 30th
- On Track Ask Tom to create lead in and out

**Writing/Publishing Goals - 2017 Q1** ✔

- On Track Create Draft # 1 by March 30

What makes this work is that the Blue Sky Vision is a 10-year vision. The Long Term Goals are 3-year goals. The 2017 Annual Goals are 1-year objectives. The blue bars you see below that are quarterly goals that need to be accomplished in order to achieve all three of the longer term goals above them. There's a lot more to this than just this screen capture. If you're thinking you would like to have a fully functioning plan that spells out how you are going to run your business and personal affairs, then give us a call for a free online demonstration. This is something you will want to see. We scoured the industry to find the perfect strategic and tactical planning app and this is it!

This is what your screen will look like when you expand your planning for a bird's eye view:

Long Term Goal				Details ▾
▼	Gross \$1M per year			
Annual Goal: Y2017				
▼	Gross \$300K in 2017	12/31/2017	On Track	Client Sales ▾
Quarterly Goal: Y2017 Q1				
▼	Gross \$10K per month in Q-1	3/31/2017	On Track	Client Sales ▾
Quarterly Goal: Y2017 Q1				
▼	Close 1 New Client Per Month @\$5kX3+AF	3/31/2017	On Track	Client Sales ▾
Long Term Goal				Details ▾
▼	Learn Software Apps			
Annual Goal: Y2017				
▼	Learn ACT-19	12/31/2017	On Track	Learning / Study ▾
Quarterly Goal: Y2017 Q1				
▼	Buy, Install, Tutorials for ACT-19	3/31/2017	On Track	Learning / Study ▾
Long Term Goal				Details ▾
▼	Create Branded Video Channel			
Annual Goal: Y2017				
▼	Create 12 PSI Videos	12/31/2017	On Track	Video ▾
Quarterly Goal: Y2017 Q1				
▼	Create V-01 by March 30th	3/31/2017	On Track	Video ▾
Quarterly Goal: Y2017 Q1				
▼	Ask Tom to create lead in and out	3/31/2017	On Track	Video ▾
Quarterly Goal: Y2017 Q1				
▼	Shoot the video in the office by March 22	3/31/2017	On Track	Video ▾

Until next week, if you know of any business that would benefit with a little coaching in the areas of on-line organization, time and task management, social media, sales, marketing, customer service, operations, HR, leadership or team-building, have them give us a call at 562-577-7000 or send us an email. We will keep you in the loop on how it's going.

Will Robertson, Founder / CEO and Jay McDowell, President / MBA are doing business as Performance Strategies as of Jan. 1, 2017. Our offices are located at 1231 E. Dyer Road, Suite 215, Santa Ana, CA 92705. You can reach us 562-577-7000. Our web site is [www.PS-MCG.com](http://www.PS-MCG.com) Our E Mail addresses: [Will@PS-MCG.com](mailto:Will@PS-MCG.com) and [Jay@PS-MCG.com](mailto:Jay@PS-MCG.com)

Our consulting and coaching focus supports management, sales, customer service and operations. Included are sales and management assessment surveys as well as leadership, teambuilding, sales operations efficiency and online tracking projects. Our other team members bring additional disciplines as well. We will showcase them in future editions of this business journal. We are all committed to driving the results you want.



Will Robertson, Founder / CEO



Jay McDowell, President / MBA