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Coaching

Freedom Planning: How to **Make** Your **Business Serve** Your **Lifestyle**

| By John Nieuwenburg

www.w5coaching.com



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01

Why do **Freedom** Planning?

Why freedom planning

So, WHY do we become entrepreneurs in the first place? I'm convinced that for most of us, it comes down to one word: FREEDOM.

We want FREEDOM: free time, free cash flow, and the freedom to pursue our passions and enjoy gratifying relationships with peace of mind. Most of us chose to pay the price of entrepreneurship because we were convinced that FREEDOM is a big enough WHY to justify the struggle that always accompanies business ownership.

BUT, hey, business is a full-contact sport as you well know. It can be jarring and bruising. And it's impossible for your business to not radically impact your spirituality, your marriage, your family, your health, and every other major area of your life, for better or worse. As the business goes, so goes the quality of your lifestyle!

Freedom Planning:

How to **Make your Business Serve Your Lifestyle**. Instead of the Other Way Around.

After 20 years as an entrepreneur and a business coach to hundreds of other entrepreneurs, I've become convinced that winning in business while hating the rest of your life is a horrible way to live.

A miserable entrepreneur is of all people most to be pitied.

A miserable employee can always quit their job if they hate it enough, but a miserable entrepreneur usually has no way out of their situation because they're trapped in a business they can't leave. So I want to teach you the skills you need to Make your Business Serve Your Lifestyle... Instead of the Other Way Around!



Why freedom planning?

“Without an
adequate answer to
the question **‘WHY?’**
any price is too high”



What is a Freedom Plan?

It is the balance between the Compass and the Clock.

The Compass and The Clock!

“Our struggle to put first things first can be characterized by the contrast between two powerful tools that direct us: the clock and the compass. The clock represents our commitments, appointments, schedules, goals, activities – what we do with, and how we manage our time. The compass represents our vision, values, principles, mission, conscience, direction – what we feel is important and how we lead our lives.”

Stephen Covey



In The 7 Habits of Highly Effective People, bestselling author Stephen Covey says that Habit 2 is to 'Begin with the End in Mind.'

Habit 2 is based on imagination – the ability to envision in your mind what you cannot presently see with your eyes. It is based on the principle that all things are created twice.

Begin with the end in mind' suggests that we need to develop a vision, a clear picture of what we choose to be and create in our lifetime. Covey illustrates this nicely by suggesting you write your own funeral speech! What kind of person have you been? What did you stand for? What did you create? What were your contributions to the people you love, and what difference have you made in their lives?

This visualization exercise connects us deeply with ourselves, and it is the perfect illustration of 'Begin with the End in Mind.' Having such a personal vision rooted in our own values acts like a guidance system.

Would you get on an airplane if you knew the pilot had not filed a navigation plan? Of course not! Are you living your life without a navigation plan?

There is a mental (first) creation and a physical (second) creation. The physical creation follows the mental creation, just as a building follows a blueprint. If you don't make a conscious effort to visualize who you are and what you want in life,



”

Things that matter most must never be at the mercy of the things that matter least.

Goethe

then you empower other people and circumstances to shape you and your life by default.

It's about reconnecting with your own uniqueness and then defining the personal, moral, and ethical guidelines within which you can most happily express and fulfill yourself. 'Begin with the End in Mind' means to start each day, task, or project with a clear vision of your desired direction and destination, and then make things happen.

In The 7 Habits of Highly Effective People, Habit 3 is to 'Put First Things First.'

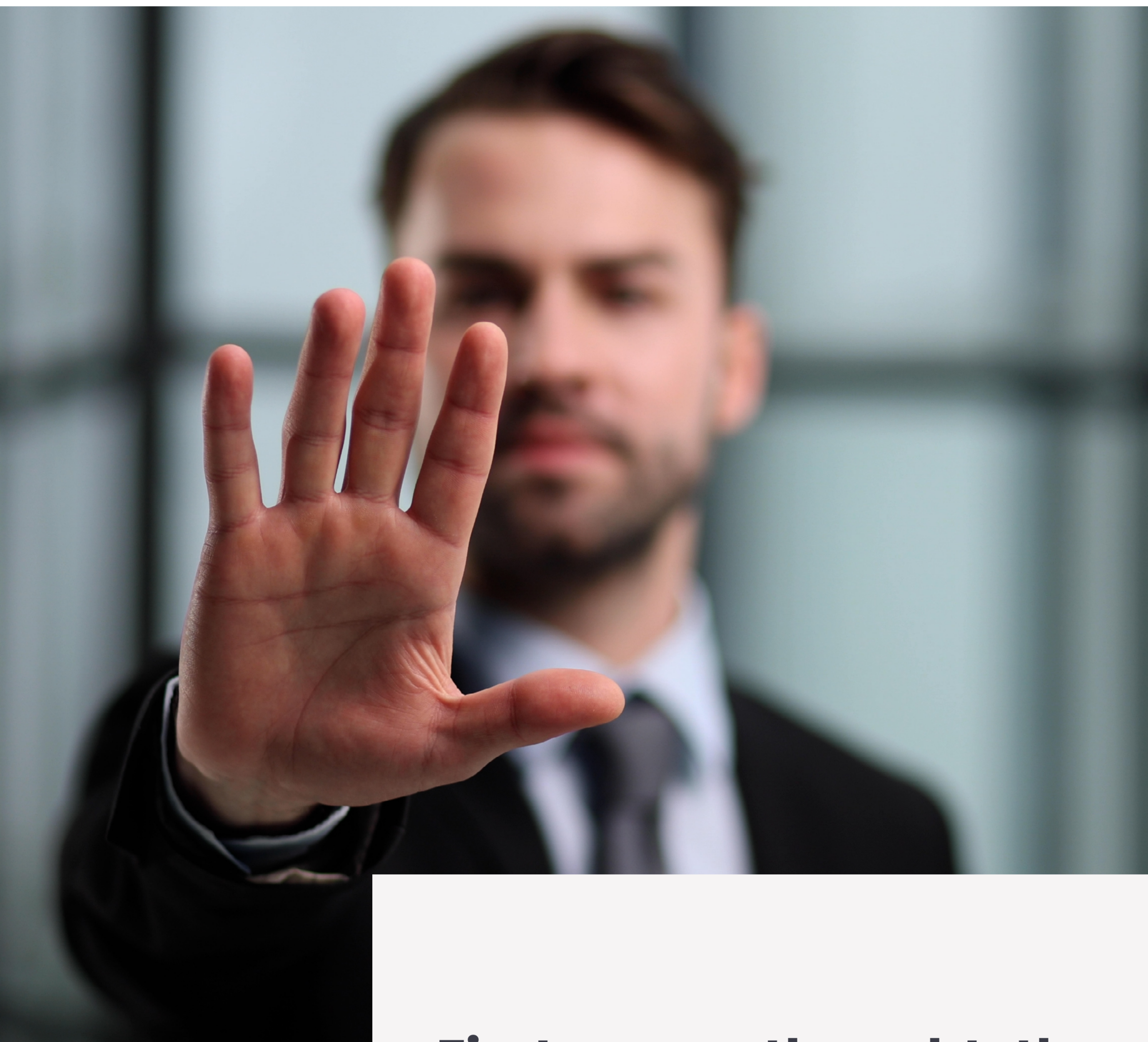
There's no need to overextend yourself. All it takes is realizing that it's alright to say no when necessary and then focus on your highest priorities. To live a more balanced existence, you have to recognize that not doing everything that comes along is okay.

Habit 2 is the first, or mental, creation. Beginning with the End in Mind is about vision. Habit 3 is the second creation, the physical creation.

Habit 3 is about life management as well – your purpose, values, roles, and priorities.

What are 'first things?'

First things are those things you, personally, find of most worth. If you put first things first, you are organizing and managing time and events according to the personal priorities you established in Habit 2.



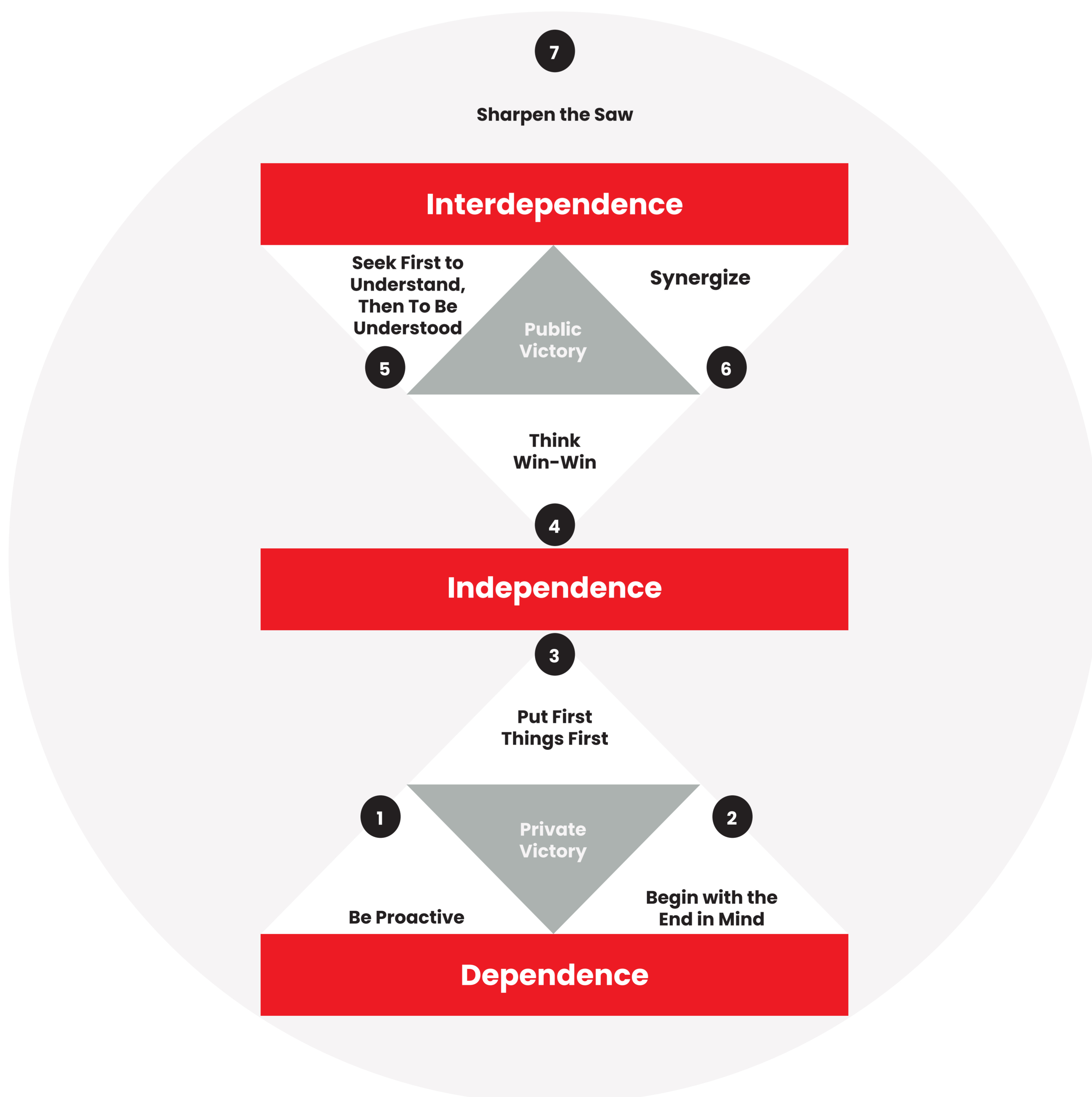
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First comes thought; then organization of that thought, into ideas and plans; then transformation of those plans into reality. The beginning, as you will observe, is in your imagination.

Napoleon Hill

Wondering what are all 7 Habits?

Covey was a bit baffled by his success. He said he was simply telling people what he thought they already knew: the efficacy of good behavior. All that people had to do was form habits out of their best instincts, he said, calling his seven nuggets of knowledge natural laws, like gravity.



The 4's of Life

There's a fascinating pattern that many observers have noticed in the lives of entrepreneurs and business leaders around the globe. Many people unwittingly move through this process as they live their lives...

Tragically, just as they reach their 50s, many individuals realize too late that in their quest for stability and, more particularly, significance in their 40s, they've neglected many of the other critically important categories of their lives, such as spiritual vitality, marriage, family, physical fitness, personal growth, hobbies, and social relationships.

20**Survival**

In our 20's it's getting the career started, paying bills, figuring out how life works.

30**Stability**


In our 30's it's learning how to be married, starting a family, figuring out how to keep all the balls in the air.

40**Success**

While in our 40's it's achieving success in business and career, usually at a significant cost to other areas of our lives.

50**Significance**

Beyond our 50's we're focused on significance—creating a lasting legacy that we can be proud of.



The difference between great people & everyone else is that great people create their lives actively, while everyone else is created by their lives, passively waiting to see where life takes them next. The difference between the two is the difference between living fully & just existing.

Michael Gerber;
Author of the E-Myth



02

3 Stage Freedom Planning Process

Purpose of Business

How Do You **Define** It?

What is the purpose of business? When I ask this question to people in coaching sessions or workshops, most of the time the answer is: to make a profit.

While profitability, cash generation, and shareholder equity are clearly fundamental to the success of any venture, they are not the only barometers of success.

A business has additional responsibilities – to provide value to its customers, opportunity to its employees, reliability to its suppliers, as well as to have a social and environmental conscience. It is true that a business has many purposes. Ultimately, the reason for a business is to give the owner the life they want.

After all you weren't born "to business", you were born "to live!"

Maslow's Hierarchy of Needs



Six Basic Needs: Tony Robbins

Certainty/Comfort

- Shelter, water & food for ourselves & family.
- Desire to avoid pain & obtain pleasure.

Variety

- If life is completely certain & predictable it is likely to become boring

Significance

- A feeling that we are unique & important, & that our life has meaning.

Connection/Love

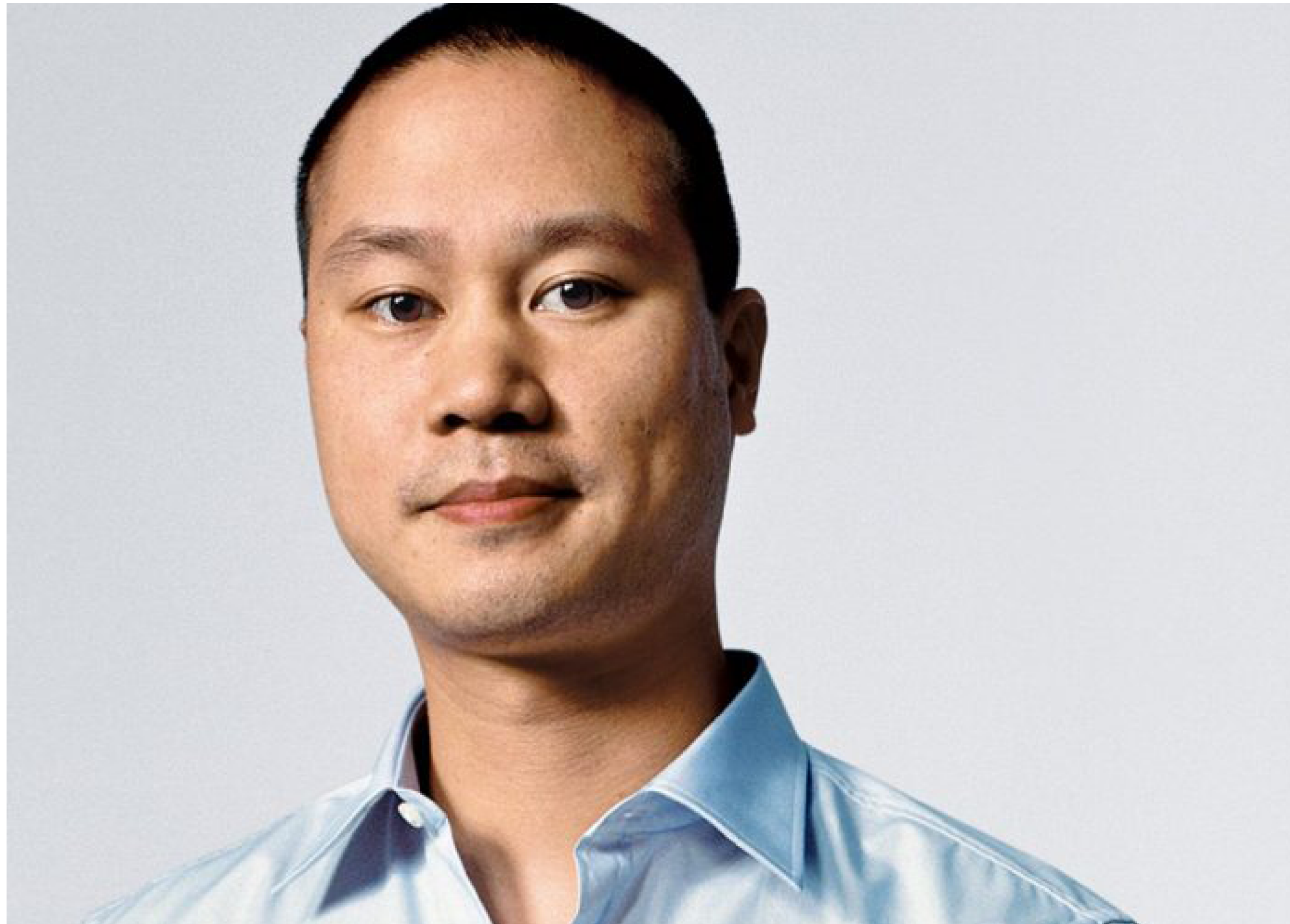
- To feel part of a community, to be cared for & cared about.

Growth

- Grow, develop & improve our abilities & position in life.

Contribution

- Contribute something of value, to help others, or to make the world a better place.



Can work make you happy, and — more than that — can work be driven by a higher purpose?

Yes, said the late Tony Hsieh, former CEO of the successful online shoe retailer Zappos, and happiness is not only essential in customers and employees, it's essential to profits as well.

Working for a paycheck, or even for a fortune, is misguided, says Hsieh. 'The default assumption that I had and that our society in general has is more money equals more happiness, and all the research has shown that that's true up to a point, up until you can get your basic needs met, but then really there is other stuff that has a much bigger impact on your happiness besides just money.'

There are 3 stages to building your life plan. Starting with your **Life, then **You** and then your **Business**.**



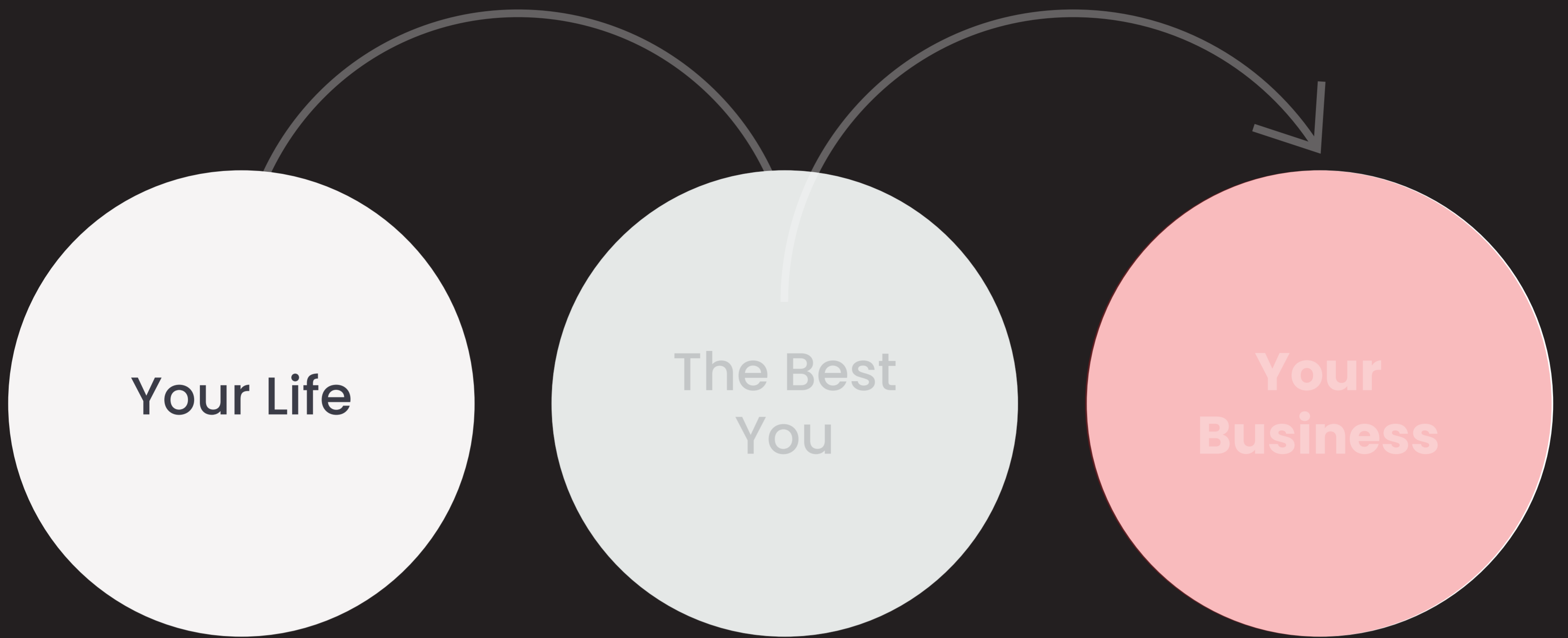
Just a word about process...

The next pages describe the **Freedom Planning process**.

Take the time to read through the entire book before you start doing your plan.

Attached to this book is an **Excel Workbook** which has all the tools described in the book where you can do your planning.

Freedom Planning	
Directions	
1	List your success and things to be grateful for!
2	Click on the Input & Graphs Tab in the lower left hand corner of this spreadsheet.
3	Fill in your name, telephone number, email, and date.
4	Then rank the 8 categories in the orange column on a scale to 1 to 10 in the light green cells. A 10 is considered optimal, a 1 least desirable.
5	Do a SWOT analysis. Go to the appropriate level of detail for each of the 8 Categories
6	Now specify where you want to be in six months from now in each category on a scale of 1 to 10.
7	To clarify your goals action steps, go to the Goals Worksheet tab by clicking on the tab in the lower left corner of this spreadsheet.
8	Begin to identify the goals and resources needed to bring that category to an 8 or above.
9	Complete the Paired Comparison Analysis
10	Place your top 10 goals in ranked order & investment needed
11	Complete Silver Bullet Score Card
12	Complete Budget or Revenue Plan
13	Complete I Am's and IVMM
14	Diary Planner to schedule Action Plan Steps
15	Complete Skill/Fun box and/or Competence/Passion Exercise



03

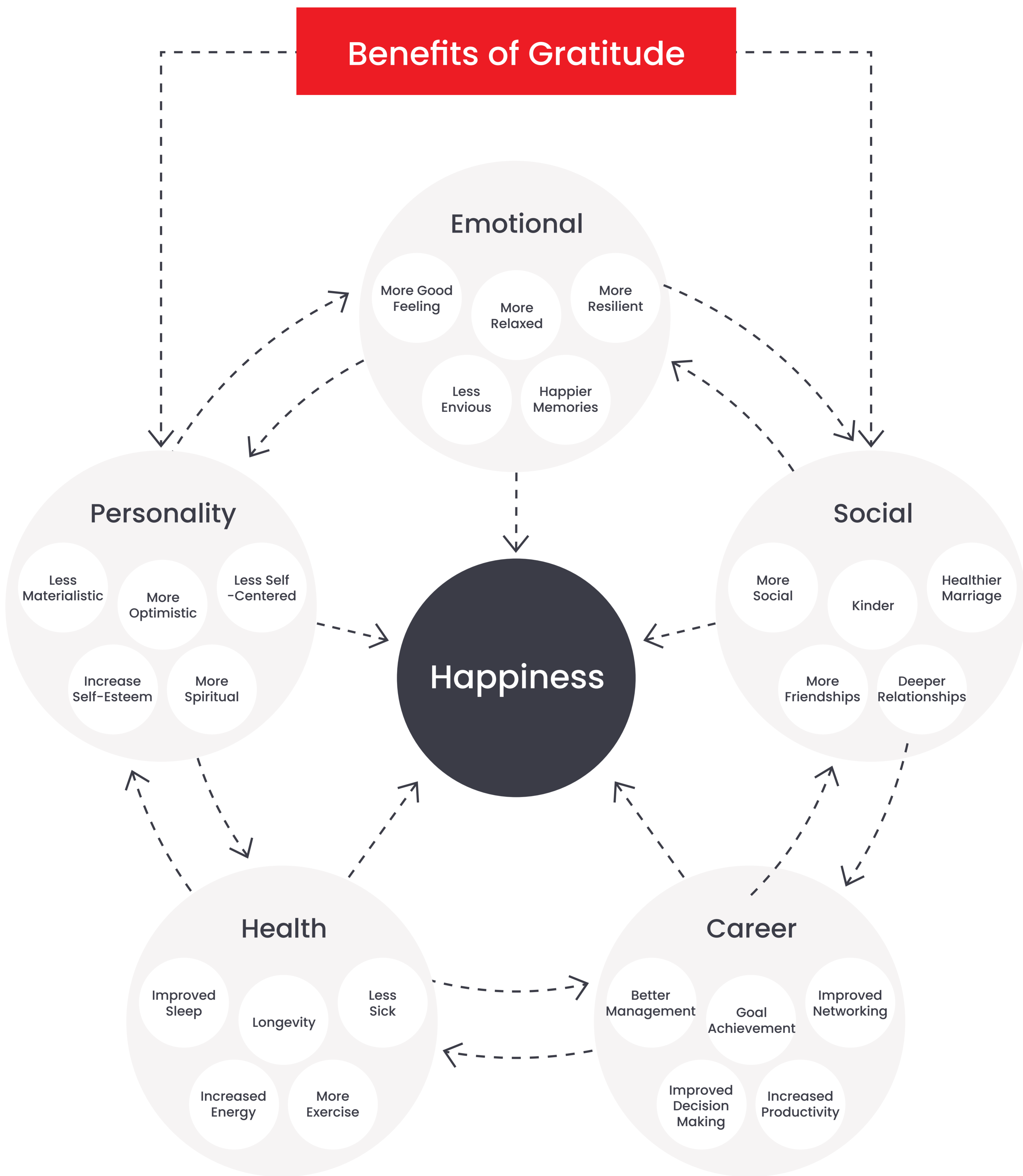
Stage 1: **Your Life**



Start your Life Plan:

By expressing thanks for the things you have.

Do you regularly give thanks for the riches within your life? If not, no worries; all is not lost. Gratitude is something that can be learned, practiced, and developed, yielding a sense of well-being, optimism, and happiness. What's more, when children see a thankful parent, they are more likely to become thankful children.



Benefits of Gratitude

Gratitude is not only the greatest of virtues, but the parent of all the others.

Marcus Tullius Cicero

01

Reach More Goals

Participants who kept gratitude lists were more likely to have made progress toward important personal goals (academic, interpersonal and health-based) than those who did not.

02

Improved Health

The study also showed physical changes: the authors reported those keeping gratitude journals exercised more regularly and reported fewer physical symptoms.

03

Better Sleep = More Energy

The study included a group of adults with neuromuscular disease who underwent a “gratitude intervention” for 3 weeks. Afterward, participants reported improvements in both how much and how well they slept.



04

Stronger Love Life

According to the authors, feelings of indebtedness showed engagement and commitment externally, but “gratitude had uniquely predictive power in relationship promotion, perhaps acting as a booster shot for the relationship.

05

Support Others

Participants in the daily gratitude condition were more likely to report having helped someone with a personal problem or having offered emotional support to another, relative to the hassles or social comparison condition.

06

Increase our Likeability

Gratitude generates social capital — in two studies with 243 total participants, those who were 10% more grateful than average had 17,5% more social capital.

The Workbook Version **Successes** & **Gratitude**

In your workbook look for this sheet to List your success and things to be grateful for during the past year!

Expressing gratitude is a way to recognize what we would like to have more of in life!

PS: I recommend that you read the entire book first before starting your own planning! That way, you'll understand the whole process!

Success and Gratitude	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	



Next is the **Wheel of Life**

When life is busy, or all your energy is focused on a special project, it's all too easy to find yourself off balance, not paying enough attention to important areas of your life. While you need to have drive and focus if you're going to get things done, taking this too far can lead to frustration and intense stress.

That's when it's time to take a 'helicopter view' of your life, so that you can bring things back into balance. This is where

the Wheel of Life can help. It helps you consider each area of your life in turn and assess what's off balance. As such, it helps you identify areas that need more attention.

1. Brainstorm Life Areas

Start by brainstorming the 6 to 8 dimensions of your life that are important to you. Different approaches to this are:

The roles you play in life, for example: husband/wife, father/mother, manager, colleague, team member, sports player, community leader, or friend.

Areas of life that are important to you, for example: artistic expression, a positive attitude, career, education, family, friends, financial freedom, physical challenge, pleasure, or public service.

Your own combination of these (or different) things, reflecting the things that are your priorities in life.

2. Write These Down on the Wheel

Write down these dimensions on the Wheel of Life diagram, one on each spoke of the life wheel.

3. Assess Each Area

This approach assumes that you will be happy and fulfilled if you can find the right balance of attention for each of these dimensions. And different areas of your life will need different levels of attention at different times. So the next step is to assess the amount of attention you're currently devoting to each area.

Consider each dimension in turn, and on a scale of 0 (low) – to 10 (high), write down the amount of attention you're devoting to that area of your life. Mark each score on the appropriate spoke of your Life Wheel.

4. Join Up the Marks

The worksheet will join up the marks around the circle. Does your life wheel look and feel balanced?

5. Think About Your Ideal Level

Next, it's time to consider your ideal level in each area of your life. A balanced life does not mean getting 5 in each life area: some areas need more attention and focus than others at any time. And inevitably you will need to make choices and compromises, as your time and energy are not in unlimited supply!

So the question is, what would the ideal level of attention be for you in each life area?

Plot the 'ideal' scores around your life wheel too.

6. Take Action

Now you have a visual representation of your current life balance and your ideal life balance. What are the gaps? These are the areas of your life that need attention.

And remember that gaps can go both ways.

There are almost certainly areas that are not getting as much attention as you'd like. However, there may also be areas where you're putting in more effort than you'd ideally like. These areas are sapping energy and enthusiasm that may be better directed elsewhere.

PS: This is just to explain how the wheel works. Next, I'll describe the Excel Workbook you'll use to do this work! In the workbook, some of the steps are automated!

The Workbook version **Balance/** **Wheel of Life**

The previous pages describe the way to do the Wheel of Life.

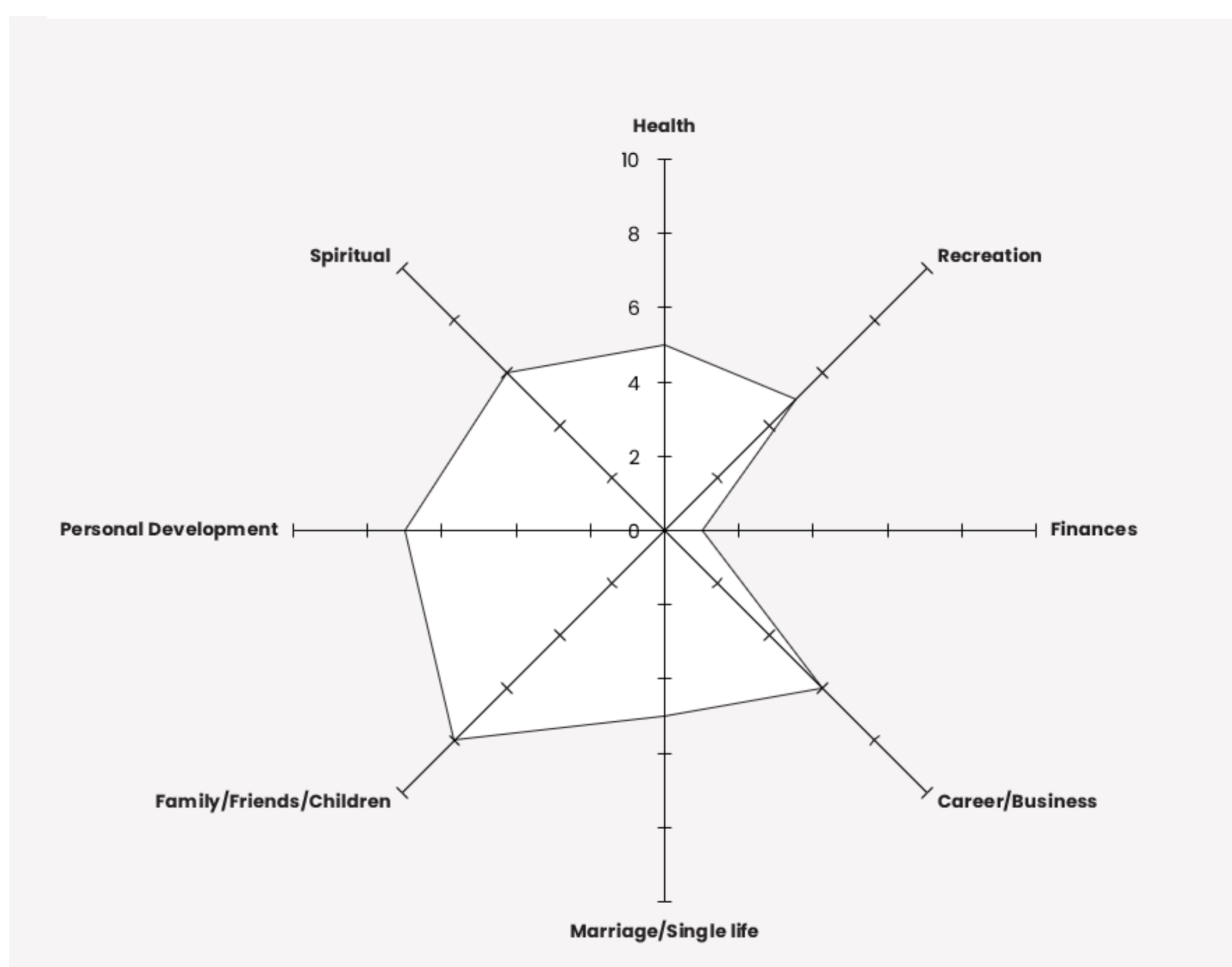
We have made it even easier in the workbook.

Use the same instructions and apply them in the attached workbook.

Balance/Wheel of Life Assessment			
Name	John Doe		
Date	April 15, 2018		
Category	A #10 would be the optimal state, and a #1 would be least desirable.	Rate Scale 1 to 10 where you are today	Where you want to be in 12 months?
Health	How would you rate your physical health? A #10 would be perfect weight, endurance, blood pressure, etc.	5	9
Recreation	Do you have the ability to simply step back, unwind and enjoy yourself, doing something that has recreational meaning to you? A #10 would be the perfect amount of recreation, a #1 would be an absence.	5	8
Finances	A #10 would mean you have enough money to live the life you desire? Are you prepared for a future retirement doing what you want to do?	1	7
Career/Business	Are you excited about your work at a #10? Do you feel 100% alive when you think about your work or is it a source of partial fulfillment only?	6	9
Marriage/Single life	Are you experiencing a deep and meaningful emotional, spiritual and physical bond with someone who makes you feel special. This would be a #10. Or are you feeling the opposite, a #1. Is this a priority to you?	5	8
Family/Friends/Children	How would you rate your family life? A 10 is a perfect the perfect connection and sense of belonging.. A #1 would mean your relationships are broken and in need of healing.	8	7
Personal Development	Are you happy with the person you are becoming? How would you rank your mental and skill development? Are you growing?	7	8
Spiritual	Are you living a life of meaning and purpose and are you daily experiencing the wonder of the spiritual aspect of life?	6	8
Average		5,375	8

We have made it even easier in the workbook.

Just input your number rating into the workbook. It will do all the work to create your wheel of life results.



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In preparing for battle, I have always found that plans are useless, but planning is indispensable.

Dwight D Eisenhower

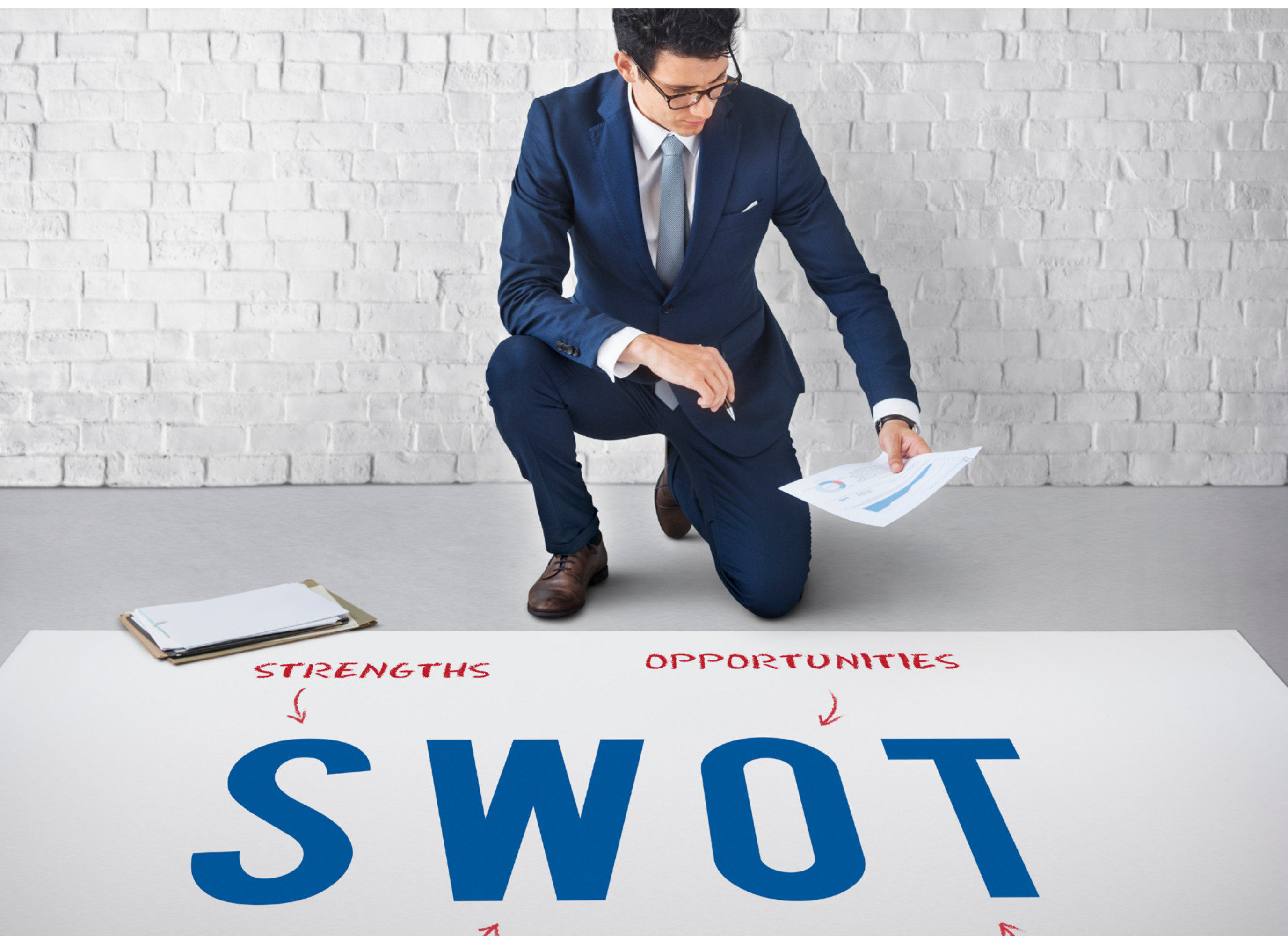
Personal **SWOT** Analysis

Next do an **assessment**

So how do you go about identifying your strengths and weaknesses, and analyzing the opportunities and threats that flow from them? SWOT Analysis is a useful technique that helps you do this.

Your Personal SWOT Analysis			
Strengths	Weakness	Opportunities	Threats

You are most likely to succeed in life if you use your talents to their fullest extent.



Similarly, you'll suffer fewer problems if you know what your weaknesses are, and if you manage these weaknesses so that they don't matter in the work you do.

What makes SWOT especially powerful is that, with a little thought, it can help you uncover opportunities that you would not otherwise have spotted. And by understanding your weaknesses, you can manage and eliminate threats that might otherwise hurt your ability to move forward. If you look at yourself using the SWOT framework, you can start to separate yourself from your peers, and further develop the specialized talents and abilities you need to advance your business and your life.

Example: SWOT analysis for Carol, an advertising agency owner.

Strengths

I'm very creative. I often impress clients with a new perspective on their brands.

I communicate well with my clients and team.

I have the ability to ask key questions to find just the right marketing angle.

Weaknesses

I have a strong, compulsive need to do things quickly and remove them from my "to do" list, and sometimes the quality of my work suffers as a result.

I get nervous when presenting ideas to clients, and this fear of public speaking often takes the passion out of my presentations.

Opportunities

One of our major competitors has developed a reputation for treating their smaller clients poorly.

I'm attending a major marketing conference next month. This will allow for



strategic networking, and also offer some great training seminars.

Threats

Due to recent staff shortages, I'm often overworked, and this negatively impacts my creativity.

The current economic climate has resulted in slow growth for the marketing industry. Many firms have laid off staff members, and our company is considering further cutbacks.

The **Workbook** version

Goals Summary

Once you have identified the areas that need attention, it's time to plan the actions needed to work on regaining balance. Starting with the neglected areas, what things do you need to start doing to regain balance? In the areas that currently sap your energy and time, what can you stop doing or reprioritize or delegate to someone else?



”

Setting goals is the first step in turning the invisible into the visible.

Tony Robbins

To clarify your goals action steps, go to the Goals Worksheet tab in your workbook. Begin to identify the goals and resources needed to bring that category to a level that is acceptable to you! Don't try to fix everything, pick the most important 2 or 3 areas that by making change will create the biggest improvements in your life.

Goals Summary																																			
Spiritual			Rating Scale 1-10			6			Family/Friends/Children			Rating Scale 1-10			8			Health			Rating Scale 1-10			5			Recreation			Rating Scale 1-10			5		
Goal			Resources/			Goal			Resources/			Goal			Resources/			Goal			Resources/			Goal			Resources/								



The **Workbook** version

Paired **Comparison** Analysis

You've now created a lot of goals.

Excellent!

Now the question is: how do you know which ones matter most? Paired Comparison Analysis helps you to work out the relative importance of a number of different options –the classical case of “comparing apples with oranges.”

It is also an ideal tool for comparing completely different options such as whether to invest in marketing, a new IT system or a new piece of machinery. These decisions are usually much harder than comparing three possible new IT systems, for example.

Goal Ranking Worksheet												
Top 10 Goals	Option	A	B	C	D	E	F	G	H	I	J	
1	A											
2	B											
3	C											
4	D											
5	E											
6	F											
7	G											
8	H											
9	I											
10	J											
	Option	A	B	C	D	E	F	G	H	I	J	Total
Add the Number of Recurrences to Determine Ranking												0

This total must equal 45; 9 Factorial!

Follow these steps to use the technique:

- 1** List the options you will compare. Assign a letter to each option.
- 2** Mark the options as row and column headings on the worksheet.
- 3** Note that the cells on the table where you will be comparing an option with itself have been blocked out – there will never be a difference in these cells!
- 4** The cells on the table where you will be duplicating a comparison are also blocked out.
- 5** Within the remaining cells compare the option in the row with the one in the column. For each cell, decide which of the two options is more important. Write down the letter of the more important option in the cell, and score the difference in importance from 0 (no difference) to 3 (major difference).

6 Finally, consolidate the results by adding up the total of all the values for each of the options. You may want to convert these values in to a percentage of the total score.

Goal Ranking Worksheet													
Top 10 Goals	Option	A	B	C	D	E	F	G	H	I	J		
1	Take a 1 week vacation in the Caribbean	A	1	1	1	1	1	7	1	1	1		
2	Attend a weekly prayer meeting at church	B		3	4	2	2	7	2	2	2		
3	Celebrate my 10th anniversary with my spouse	C			3	3	3	7	3	3	3		
4	Hit \$5 million in revenue and 20% EBITDA	D				4	4	7	4	4	4		
5	Take my kids on a special event for their birthdays	E					5	7	5	5	5		
6	Invest in 2 rental properties	F						7	8	8	8		
7	Hire someone to manage estimating department	G							7	7	7		
8	Upgrade the computer network in the office	H								9	8		
9	Get a new motor cycle	I									10		
10	Finish writing my first book	J											
		Option	A	B	C	D	E	F	G	H	I	J	Total
Add the Number of Recurrences to Determine Ranking			8	5	7	6	4	2	9	2	1	1	45
This total must equal 45; 9 Factorial!													

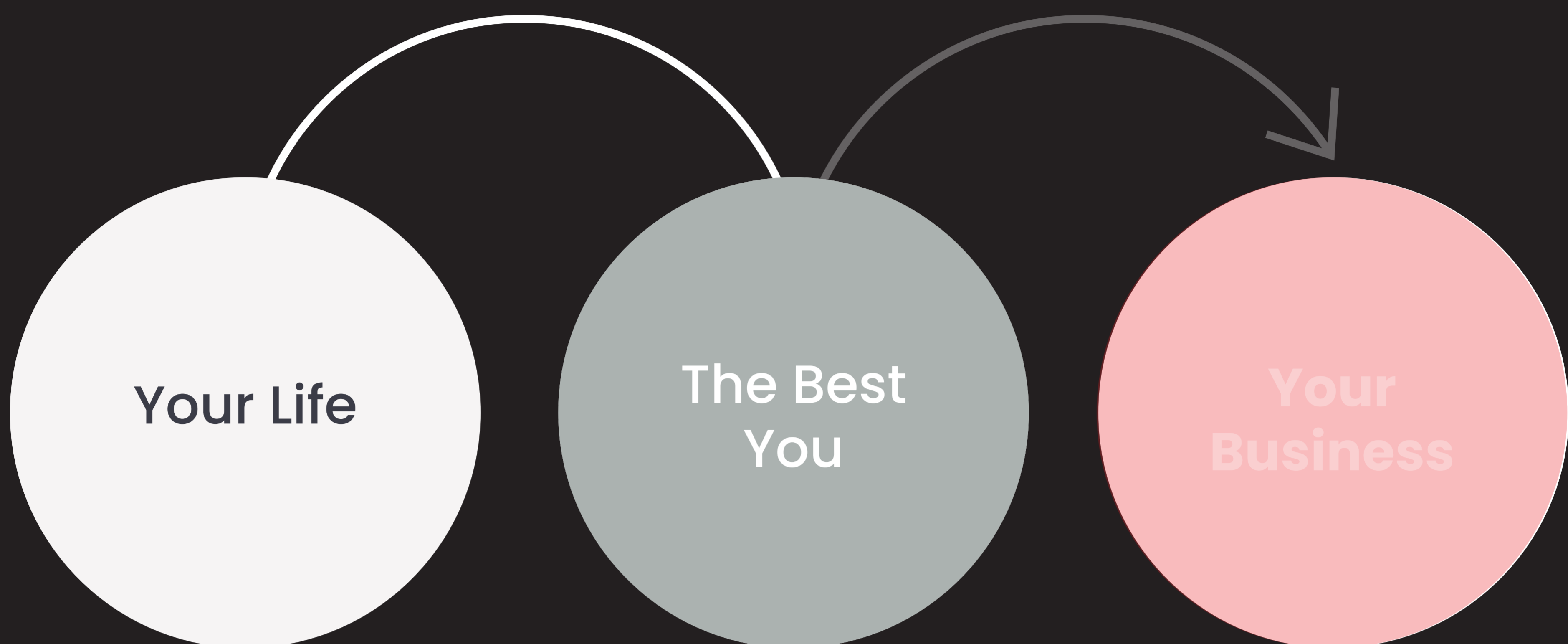
Goal Investment **Ranking**

Place your top 10 goals in ranked order & investment needed.

Top 10 Goals		Option	Rank	\$ Needed	
1	Take a 1 week vacation in the Caribbean	A		\$	-
2	Attend a weekly prayer meeting at church	B		\$	-
3	Celebrate my 10th anniversary with my spouse	C		\$	-
4	Hit \$5 million in revenue and 20% EBITDA	D		\$	-
5	Take my kids on a special event for their birthdays	E		\$	-
6	Invest in 2 rental properties	F		\$	-
7	Hire someone to manage estimating department	G		\$	-
8	Upgrade the computer network in the office	H		\$	-
9	Get a new motor cycle	I		\$	-
10	Finish writing my first book	J		\$	-
		‡ Total	0	\$	-

Here's an example:

Top 10 Goals		Option	Rank	\$ Needed
1	Take a 1 week vacation in the Caribbean	A	8	\$ 10.000,00
2	Attend a weekly prayer meeting at church	B	5	\$ -
3	Celebrate my 10th anniversary with my spouse	C	7	\$ 2.000,00
4	Hit \$5 million in revenue and 20% EBITDA	D	6	\$ -
5	Take my kids on a special event for their birthdays	E	4	\$ 1.000,00
6	Invest in 2 rental properties	F	2	\$ 50.000,00
7	Hire someone to manage estimating department	G	9	\$ -
8	Upgrade the computer network in the office	H	2	\$ -
9	Get a new motor cycle	I	1	\$ 5.500,00
10	Finish writing my first book	J	1	\$ 500,00
‡ Total			45	\$ 69.000,00



04

Let's move
to Stage 2:
The **Best You**;
You **Can Be**



”

**Today you are You, that is truer
than true. There is no one alive
who is Youer than you.**

Dr. Seuss

What is your definition?



”

Today you are You, that is truer than true. There is no one alive who is Youer than you.

Dr. Seuss

What is your
definition?

What is the
perfect you?



”

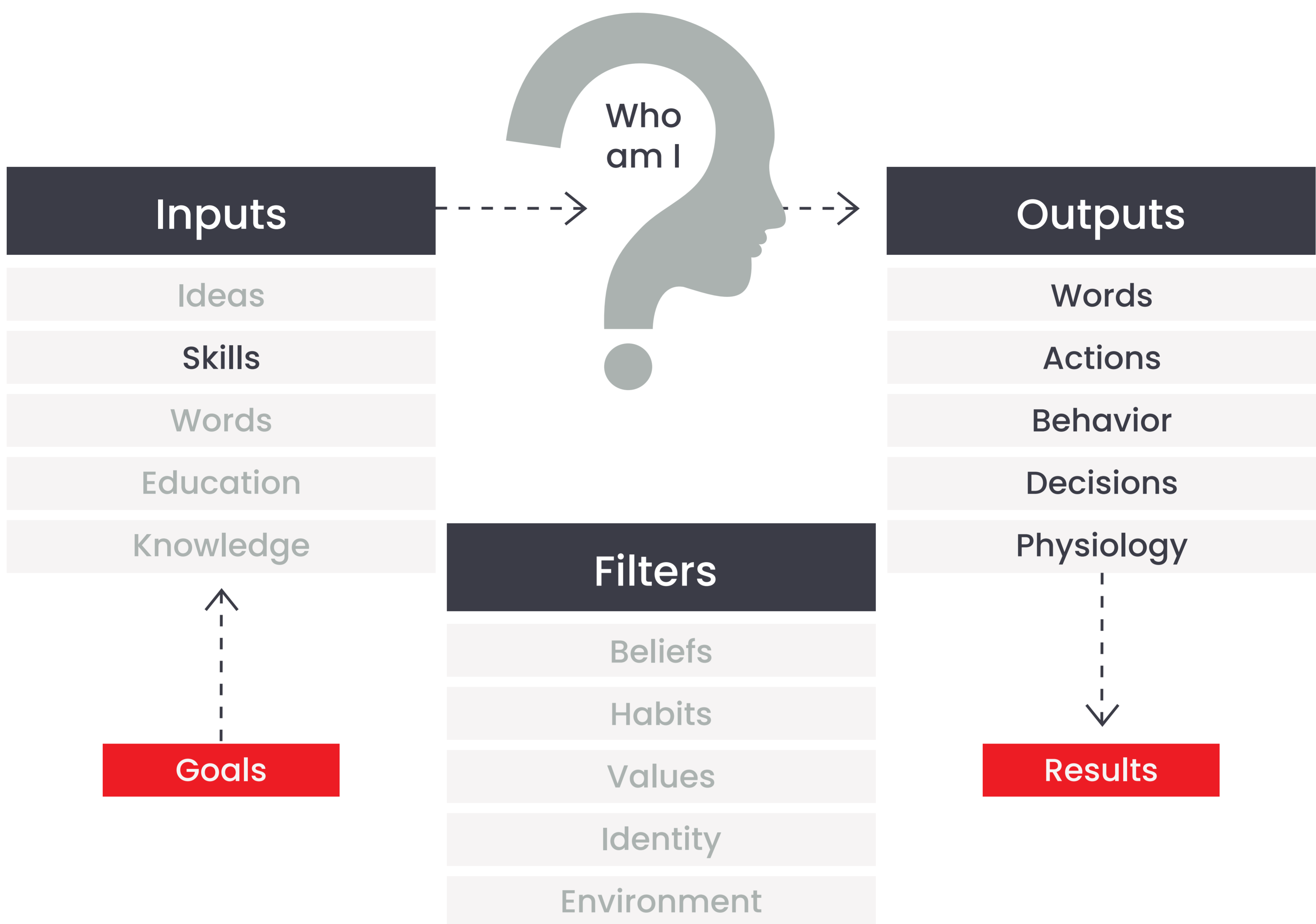
**Today you are You, that is truer
than true. There is no one alive
who is Youer than you.**

Dr. Seuss

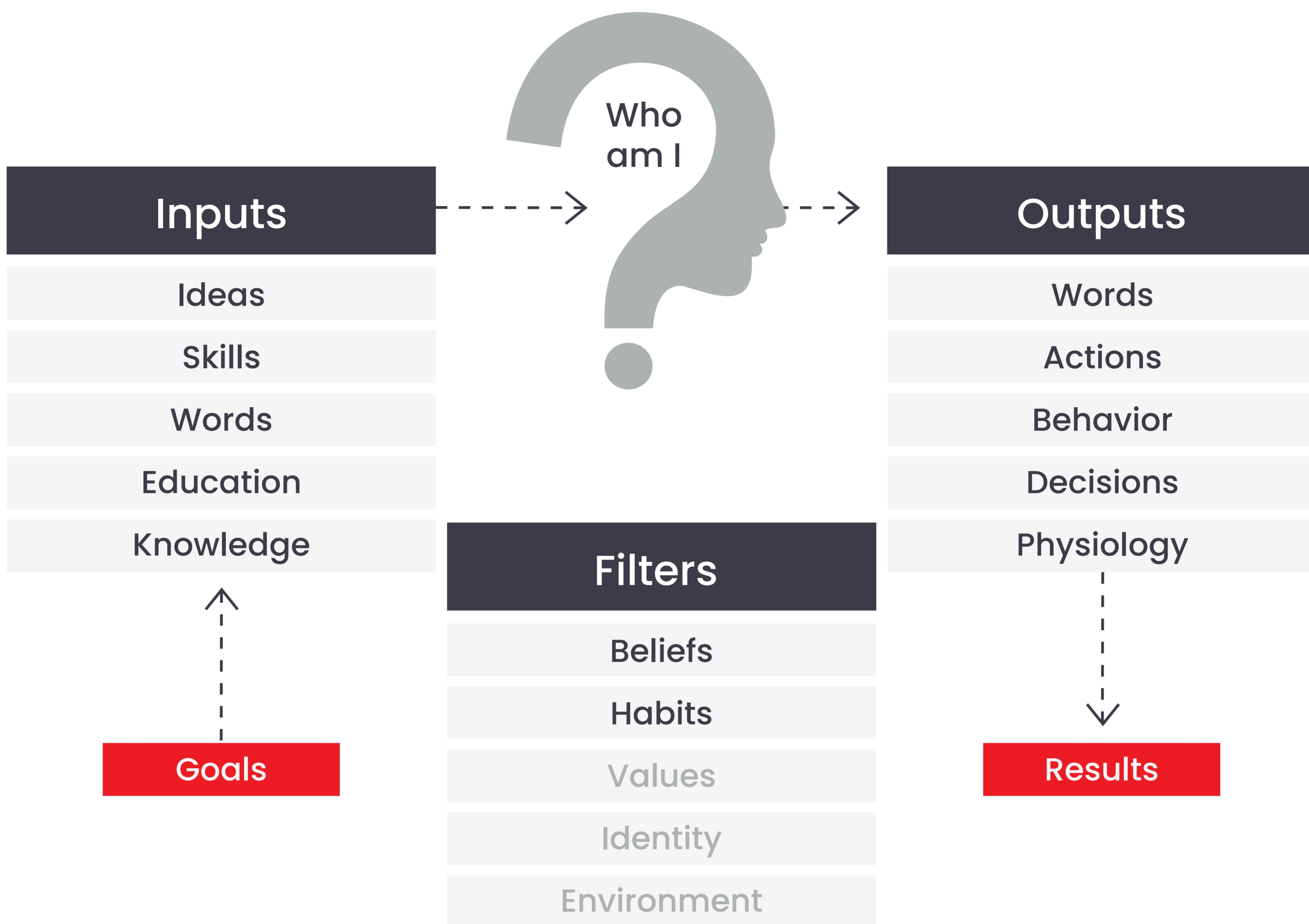
Identity **Iceberg**

Think of yourself as an iceberg. Like most icebergs only ten percent of it is exposed above the water line.

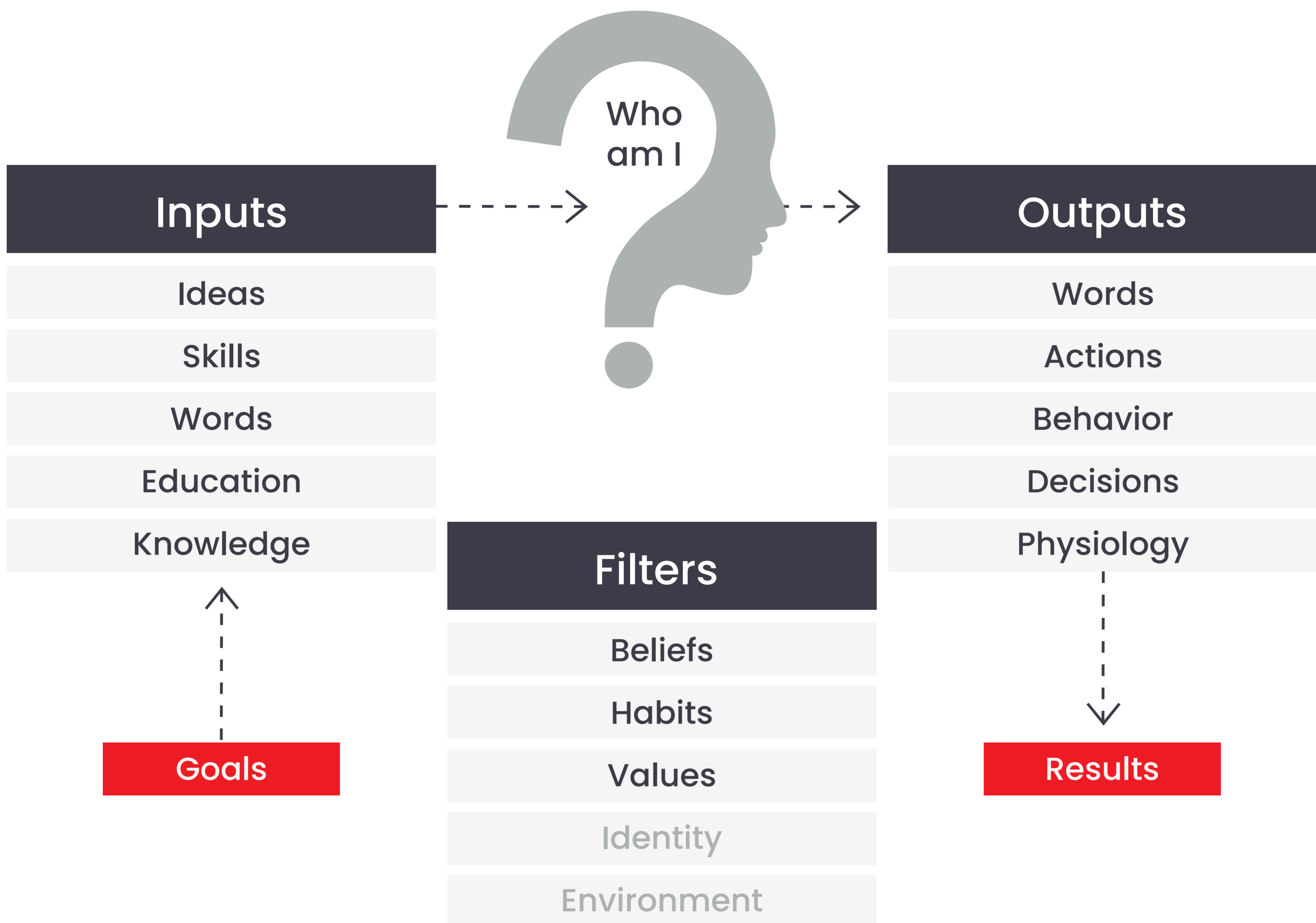
That ten percent above the waterline represents the visible things that others can see. These are the actions we take and the behaviors we exhibit on a daily basis. The 90 percent below the waterline is far more important. And, like the Titanic, what's below the waterline is the stuff that can sink you. So, what's below the waterline? There are four elements that cause you to behave and act in certain ways.



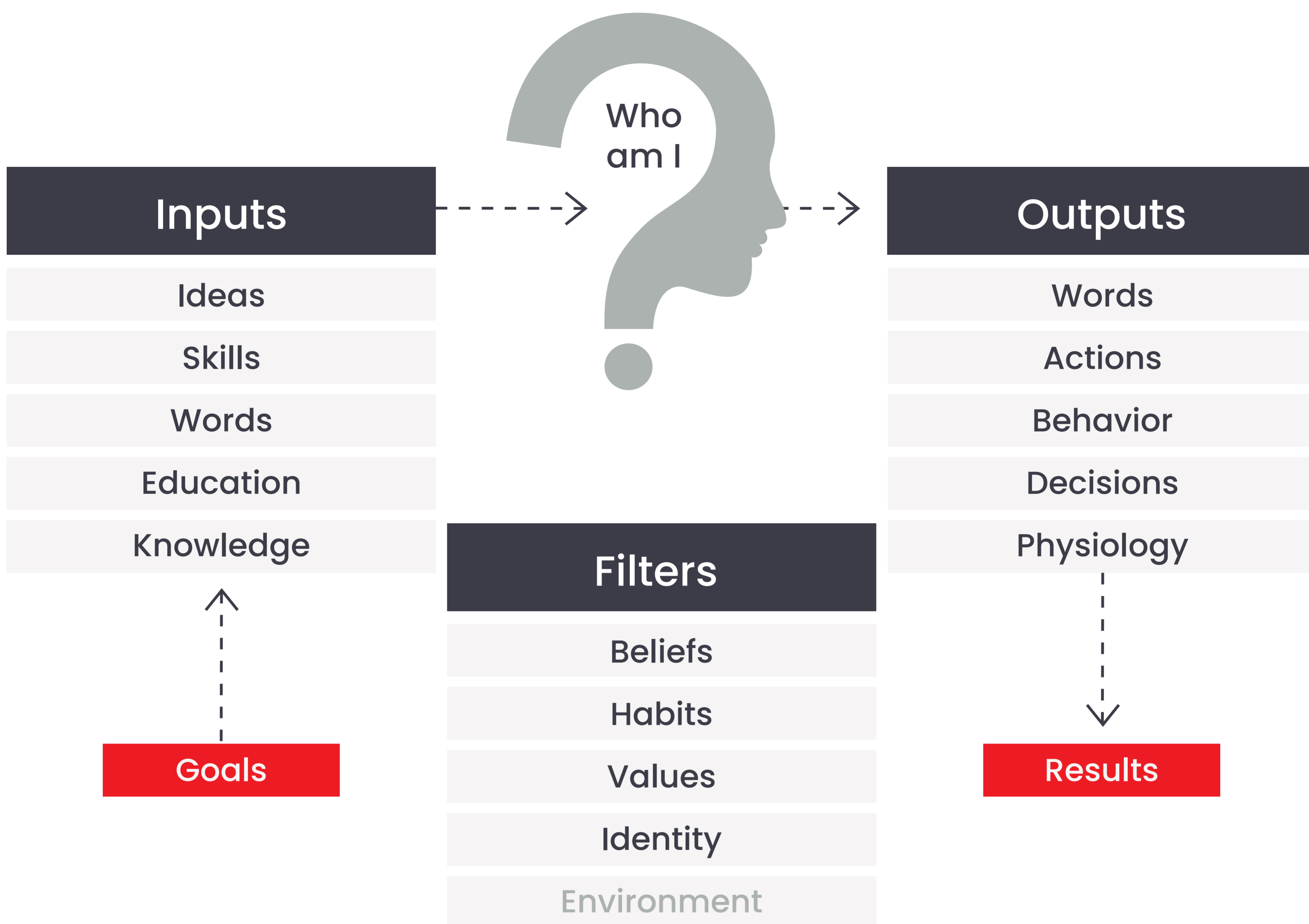
1 Skills — your skills will dictate what you do and how well you do it. For example, if you are a good cook you would probably invite your friends over for dinner and cook for them. If you were not a good cook you would take them to a nice restaurant and spring for the bill. Can you change your skills? Of course you can. Read more books, go to seminars, take a class, get a mentor... there are many ways to change your skills.



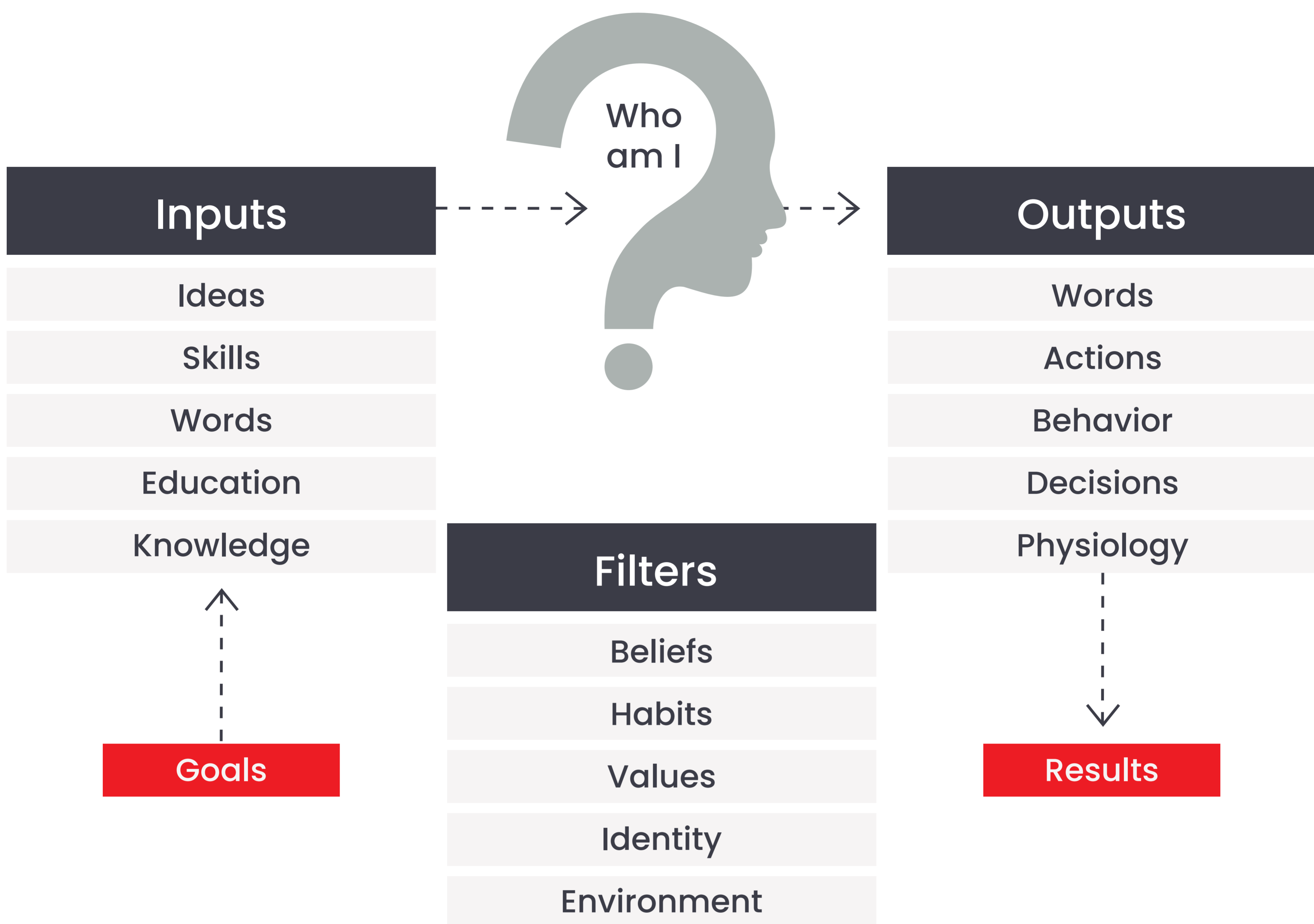
2 Beliefs — Beliefs are what you hold to be true. In many cases your beliefs are the basis for your skills. For example, you may think you are not very good at golf because you tried it once and found it too difficult to hit the ball. You tell yourself you are not good at the game, you believe it and consequently you stink at golf. Change your beliefs and see how differently you will approach the game, whether that be the game of golf or the game of business.



3 Values — these are the things that are very important to you. They may include money, relationships, acceptance and health. Your values drive your behaviors. For example, if you value your health you might work out quite often. If you value money you might work harder at work than you do in the gym.



4 Identity — the last element of the iceberg below the waterline is your core identity. This is what you believe yourself to be.... what you tell yourself you are. Sometimes your identity can limit you. If you tell yourself you will never be a great sales person... guess what? This is where positive affirmations can help. Write down the things you are or want to be and read them to yourself as often as you can. These positive affirmations will begin to form a more positive identity.



5 Now, surrounding this iceberg is the **environment**. The environment can definitely influence all the elements of the iceberg. How can you use your environment to help you make changes? Well, if you associate yourself with highly successful and positive people do you think it will help you change your identity and improve your chances for success? I would like to think so. You might be asking yourself, "how can I get to

meet these kinds of people". Well, you really don't have to meet them directly. You can read their books, listen to their CD's and watch their videos. There is plenty of material out there.

Your environment does have an impact on you. So in order to get better results we need to make changes. But when making changes, we need to look at the entire iceberg as well as the environment that surrounds it. Looking at each one of these elements will allow you to make permanent and lasting changes in your business and your life.

Do you want to know who you are? Don't ask. Act! Action will delineate and define you.

Thomas Jefferson



IVVM

Making **Freedom**
Come **True**

Idealization

**To make a dream come true,
first you have to have one...**

Dream bigger!

Most people ask for too little in life, today as a company what we're doing is asking for more, asking for something bigger and better...

Stress that you choose your reality, good or bad with the seeds you plant in your mind each and everyday.

”

**Imagination is everything.
It is the preview of life's
coming attractions.**

Albert Einstein

Visualization

You must **focus** on that **dream day** and night to **make it a reality** in your mind, only then can it become a reality in life...

Russian scientists compared 4 groups of Olympic athletes who had:

- 1** **100%** physical training;
- 2** **75%** physical training with **25%** mental training;
- 3** **50%** mental training with **50%** physical training;
- 4** **75%** mental training with **25%** physical training.

Guess which group had the best performance results?



Create your **vision board**

How to Create an Empowering Vision Board.

Your brain will work tirelessly to achieve the statements you give your subconscious mind. And when those statements are the affirmations and images of your goals, you are destined to achieve them! Creating a vision board is one of the most valuable visualization tools available to you. This powerful tool serves as your image of the future - a tangible representation of where you are



going. It represents your dreams, your goals, and your ideal life.

Because your mind responds strongly to visual stimulation by representing your goals with pictures and images you will actually strengthen and stimulate your emotions... and your emotions are the vibrational energy that activates the Law of Attraction. The saying 'A picture is worth a thousand words,' certainly holds true here.

If you have already defined your dreams, it's time to illustrate them visually.

Not a visual person? Do you prefer to **write** your **vision**?

This is the **tool** for you

Idealization

The first step is to brainstorm about the things that you want to HAVE. Include things like your business(es), homes, cars, collections, toys, cash and investments, etc. It is important that you be specific. See, feel, hear and smell whatever it is that you are writing about. Remember - this is FUTURE BASED. Please don't simply describe your present!!! smell whatever it is that you.

I Have...

1	Main residence	Take someone on a tour. Describe what you see as you enter the driveway. Describe the lawn, exterior, etc. Park the car (how many garages?), and take them into the home. Describe the rooms as you walk through. Tell them about the furnishings, electronics, and decorations. Describe the views. How many bedrooms, bathrooms, square feet, etc. Who lives there?
2	Vacation Homes	Where are they? How often do you visit them? What activities do you enjoy while there? Similar to the description of your main home, take someone on a tour.
3	Cars	How many? What type of cars? Be specific as to color, year, make, model, interior, etc.
4	Other Significant Assets	Boats, planes, motorcycles, etc. Again, be specific as to year, make, model, colors, interiors. Where do you keep them? How often do you use them?
5	Personal Effects	Where do you shop? What does your wardrobe consist of? Do you wear jewelry?
6	Hobbies	Do you want to have a certain collection, such as art, libraries, collectibles? Where do you find them? How much do you have invested in them, and what is their worth now? Do you plan regular vacations to search for more treasures? Who do you share this experience with?
7	Business(es)	What do(es) your business(es) look like? How many employees? Where do you work (eg - do you have a home office?) What are your gross revenues, profit margin and net income? Where are they located, and in what industries?
8	Investments	Describe your investments. Do you have land, property, shares in privately held companies, shares in publicly held companies, mutual funds, retirement funds... What is the mix in blue chips, growth, international, retail, utilities, futures? How much cash do you maintain? How much income do you make from your investments? What is your net worth? Where are your properties located?
9	Major Achievements and Awards	In your businesses, community and family life, you will accomplish major achievements and receive awards for your focused and congruent actions. What are they? How, where and when do you receive them? Who presents them to you? While you certainly won't receive a plaque for your family success, what marks an "accomplishment" for your family life? State the award or achievement, and what you have done to achieve the award.
10	Other	What else do you "have" that has not been mentioned?

The next step is to "materialize" the DO. This is where we can get a little more adventurous, and look at the things you want to do, the places you want to go and the experiences you want to have in your life ...

What I DO...

1	Family	How much time do you spend with your family on a daily/weekly basis? What do you do together? What do you concentrate on teaching your children? How much quality time do you spend with your spouse, and what types of activities do you engage in?
2	Business(es)	Describe your average work day. Where do you work? Who do you meet with regularly? How often do you work? How do you remain on top of your game?
3	Hobbies	What do you do for fun and relaxation? Do you attend concerts, plays, seminars, conferences - and how often? Do you attend sporting events?
4	Health and Fitness	What types of food do you eat? How often do you exercise and what type of exercise (aerobic/anaerobic)? What sports or activities do you engage in regularly? Do you take supplements?
5	Vacations and Holidays	How often do you vacation? Where do you go? What do you do while on vacation?
6	Social Activities	Do you entertain regularly? How often do you have friends and family over? How often do you visit them? What do you do together?
7	Community/Volunteer Activity	What do you do to give back to the society that has given you so much? How often do you contribute your time to your community? What roles do you serve in philanthropic clubs? How much money do you donate?
8	Other	What else do you "do" on a daily/weekly/monthly/yearly basis?

The next step is to "materialize" the BE. Here's where you really have to start to think about who it is you want to be, how you want people to remember you, and most importantly ... what's important to you.

Who I Will BE (starting now, of course)...

1	Spiritually	How often do you meditate/pray? What is your relationship with God (or whatever you call the "Greater Power")? Do you attend church regularly? What values and beliefs do you hold dear?
2	Emotionally	How do you "feel" regularly? What are the emotions that you rank as the emotions that you will maintain daily? How will you treat yourself and others that you come in contact with?
3	Mentally	How do you maintain your edge? What mental strengths do you feel are important to you and that you will continue to cultivate?
4	Family	What is your role in your family? How will the relationship that you have cultivated with your family make you better at your role? What are your relationships like?
5	Business	What is the image of yourself as a business owner? What standards do you hold dear, and how will you conduct yourself to ensure that those values are met? How do you dress? What is your relationship to your employees and partners?
6	Socially	What kind of friend are you? What kind of relationships do you have with your friends? What particular friendships are important to you?
7	Other	What other attributes do you value?

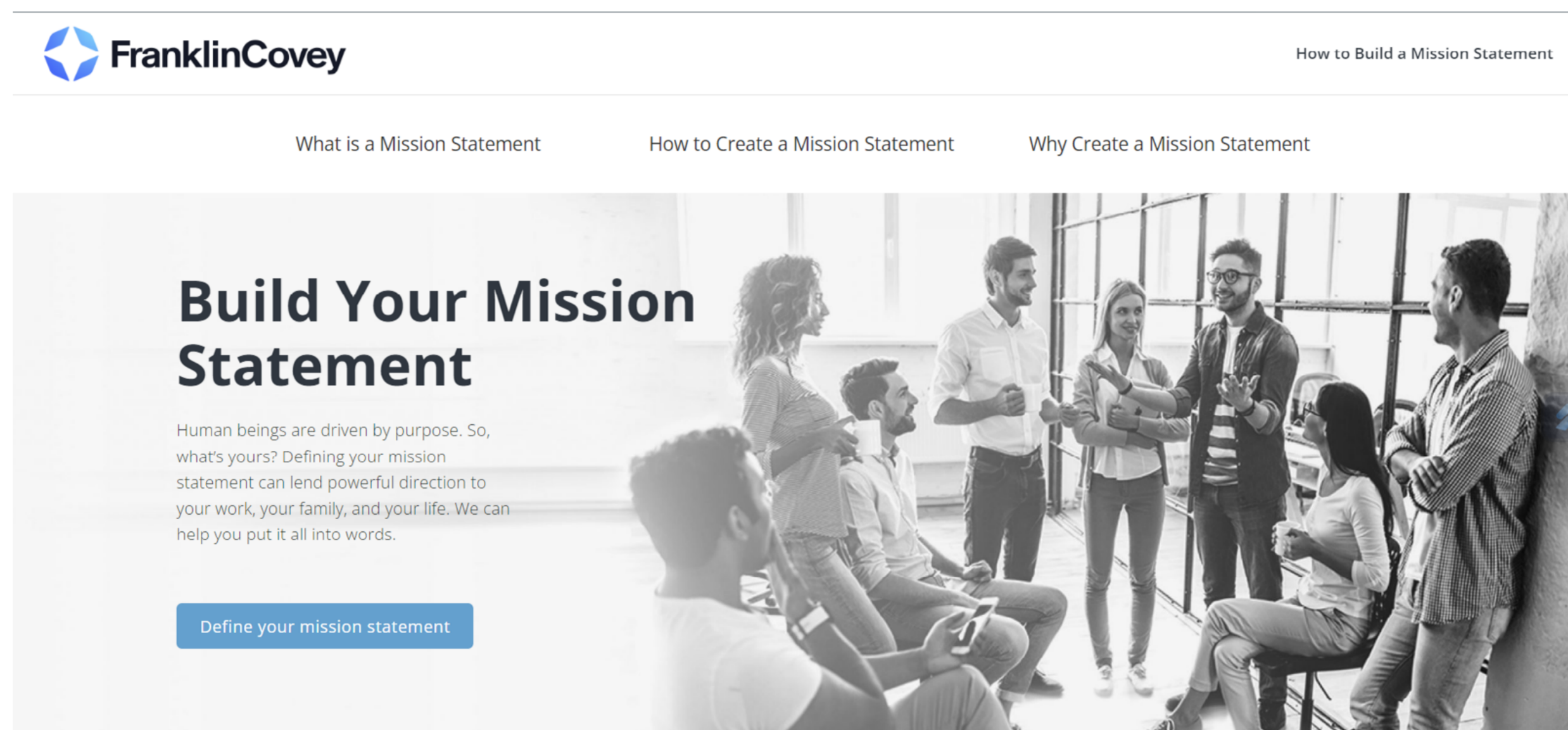
FranklinCovey

Mission Statement Builder

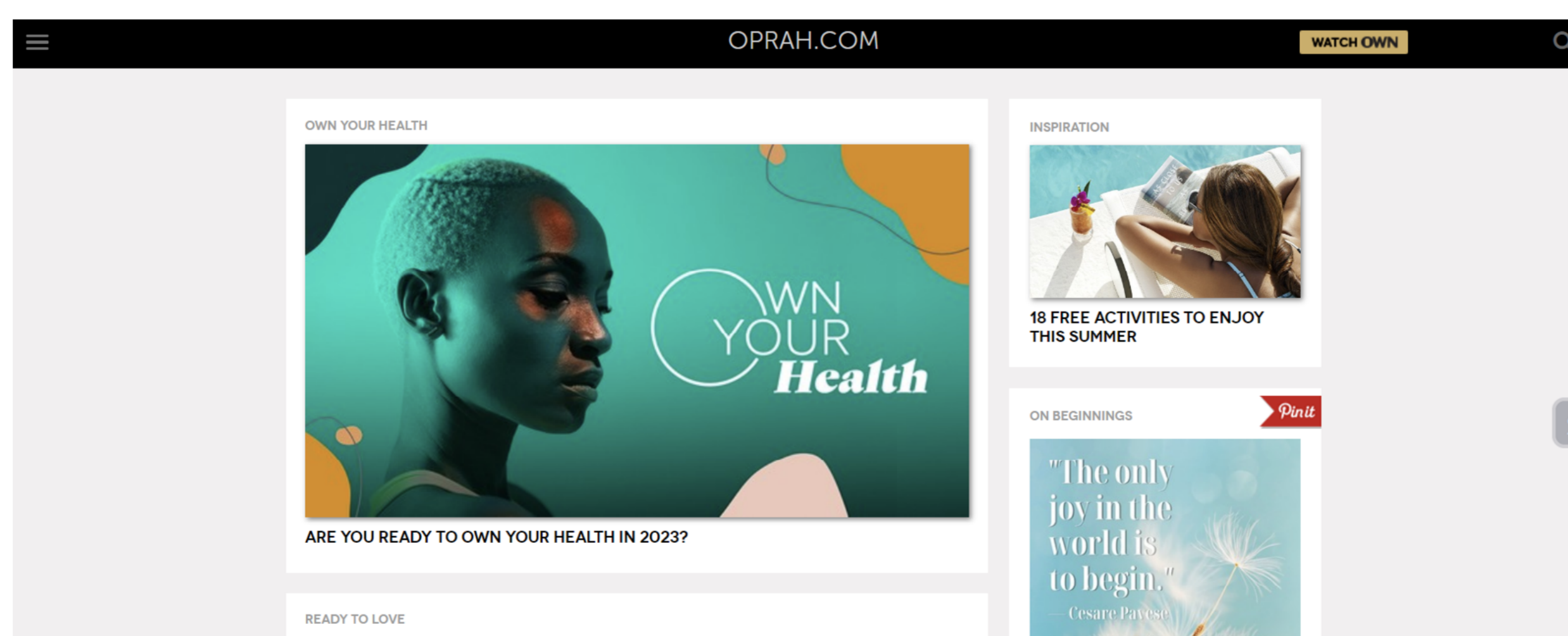
Want some help to build out your Life Vision?

The Mission Statement Builder from FranklinCovey is awesome.

FranklinCovey



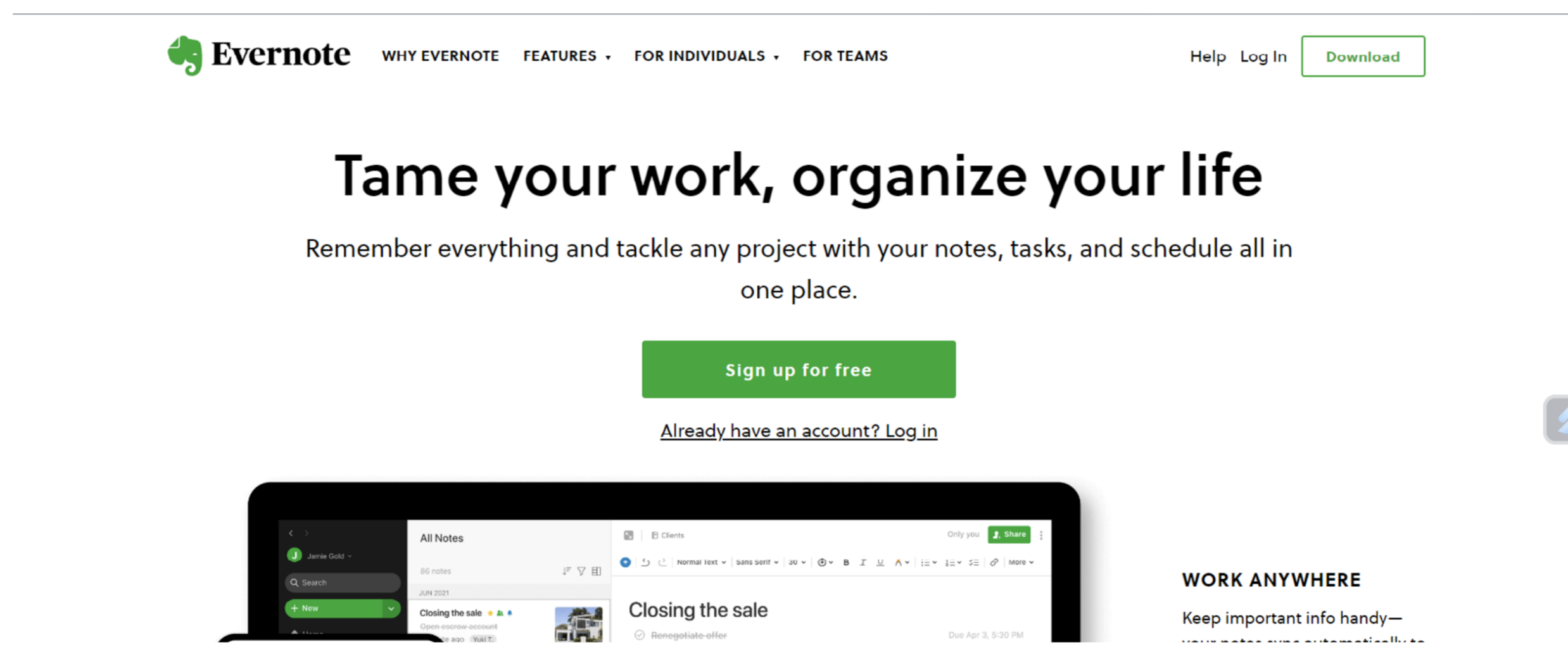
Oprah's Dream Board



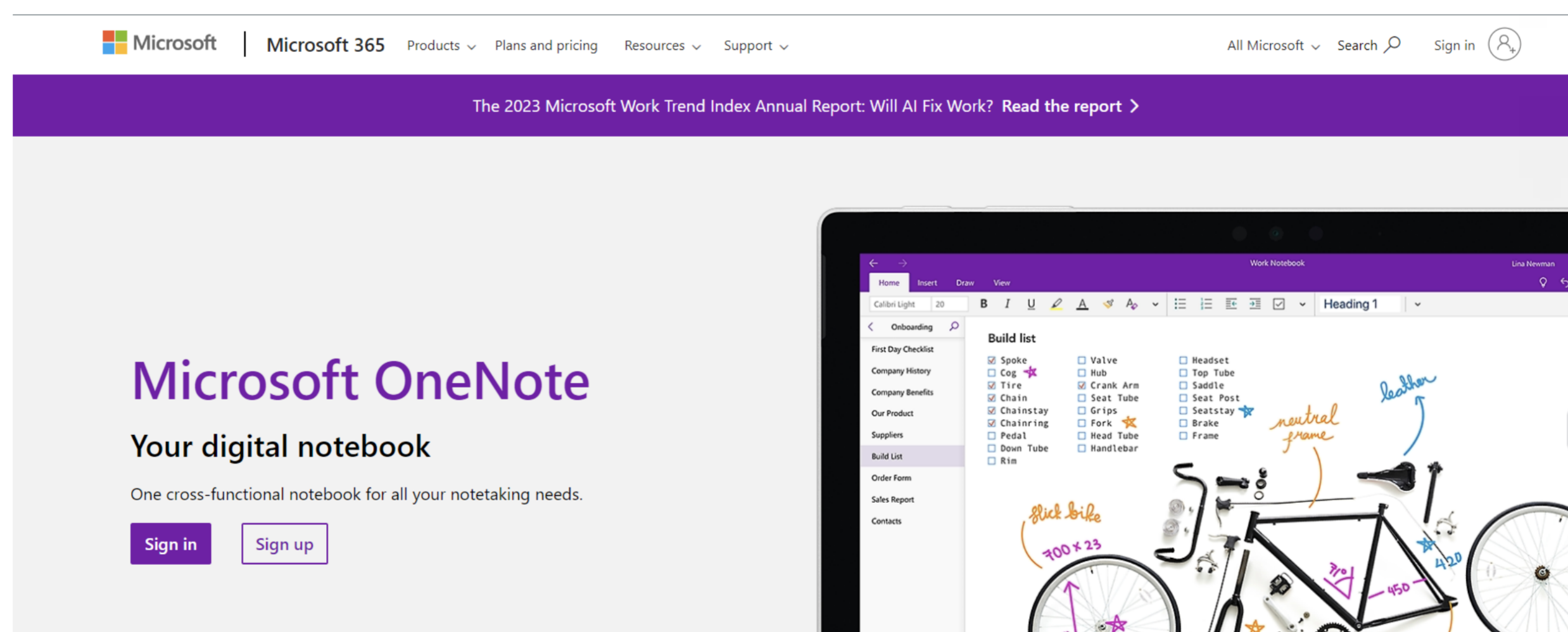
Do you want to create your Vision Board using technology?

These tools are great!

Evernote



Microsoft's One Note





The most creative act you will ever undertake is the act of creating yourself.

Deepak Chopra

Verbalization

Self-affirmations are positive statements or self-scripts that can condition the subconscious mind to help you develop a more positive perception of yourself. It reminds us of when we are at our best. When used regularly, affirmations become a roadmap to becoming the best you; you can be!

Your I AM's

Make a list of 21 "I AM" statements about your future self. Describe traits you want to build on - or more specifically - describe the person you need to become in order to do the things you want to do, to have the things that you want to have, and to live the experience that you dream of. State these out aloud every single day - at least twice - with as much passion, volume and desire that you possibly can.

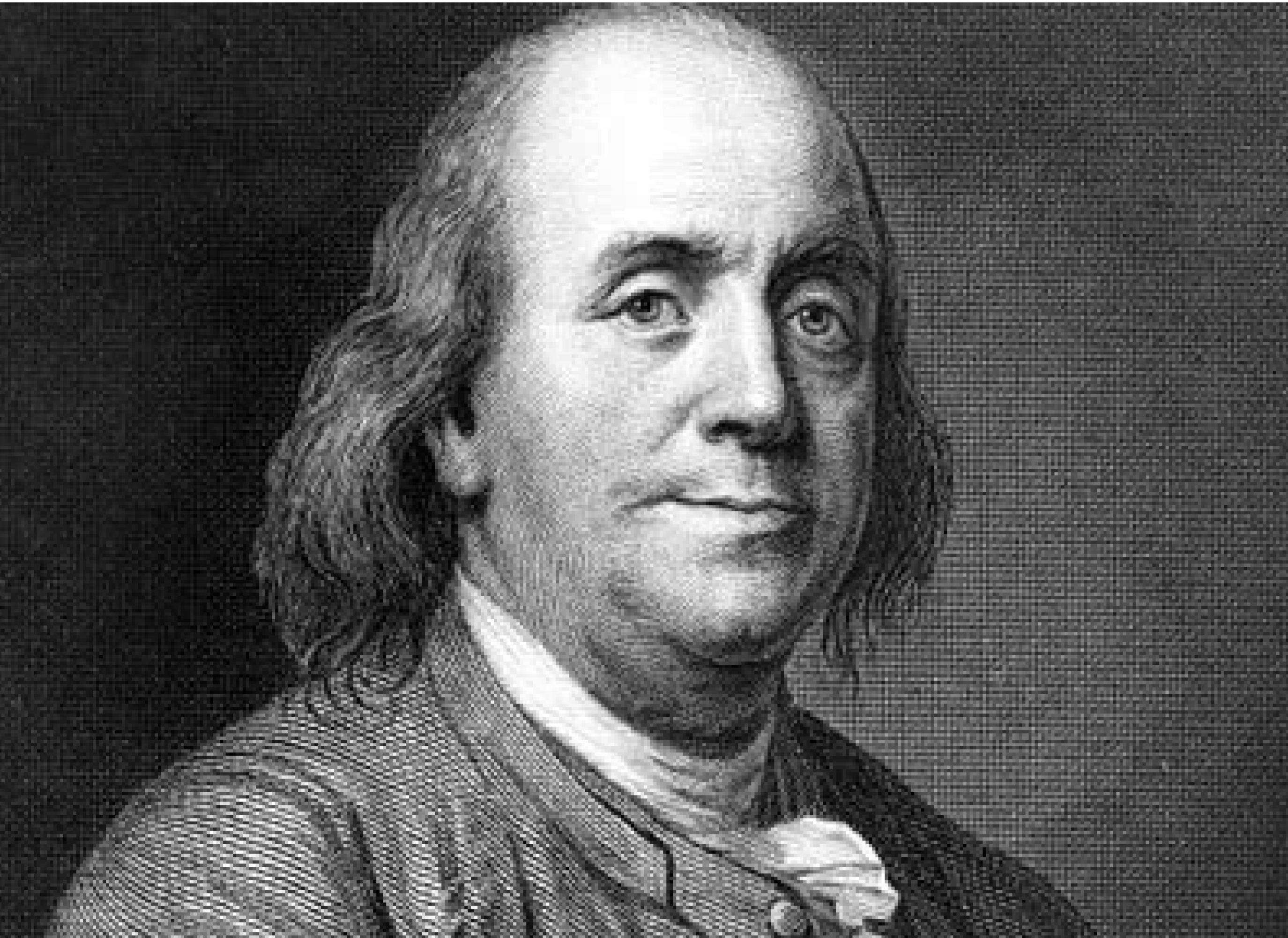
	I AM...	Additional Comments
1		
2		
3		
4		
5		
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21		

Ben Franklin's

13 Virtues

"You probably know him as one of the Fathers of the United States, a great leader and diplomat. He signed the Declaration of Independence and the Constitution. But did you know that in 1726, at the age of 20, Benjamin Franklin developed a 'Plan' for regulating his future conduct? He followed the plan he created 'pretty faithfully' even to the age of 79.

He committed to giving strict attention to one virtue each week, so after 13 weeks, he moved through all 13. After 13 weeks, he would start the process over again, so in one year, he would complete the course a total of 4 times. He tracked his progress by using a little book of 13 charts. The charts had a column for each day of the week and thirteen rows marked with the first letter of each of the 13 virtues. Every evening he would



review the day and put a mark (dot) next to each virtue for each fault committed with respect to that virtue for that day.

Temperance. Eat not to dullness; drink not to elevation.

Silence. Speak not but what may benefit others or yourself; avoid trifling conversation.

1 **Order.** Let all your things have their places; let each part of your business have its time.

- 2 Resolution.** Resolve to perform what you ought; perform without fail what you resolve.
- 3 Frugality.** Make no expense but to do good to others or yourself; i.e., waste nothing.
- 4 Industry.** Lose no time; be always employed in something useful; cut off all unnecessary actions.
- 5 Sincerity.** Use no hurtful deceit; think innocently and justly, and, if you speak, speak accordingly.
- 6 Justice.** Wrong none by doing injuries, or omitting the benefits that are your duty.
- 7 Moderation.** Avoid extremes; forbear resenting injuries so much as you think they deserve.
- 8 Cleanliness.** Tolerate no uncleanness in body, clothes, or habitation.
- 9 Tranquillity.** Be not disturbed at trifles, or at accidents common or unavoidable.

- 10 Chastity.** Rarely use venery but for health or offspring, never to dullness, weakness, or the injury of your own or another's peace or reputation.
- 11 Humility.** Imitate Jesus and Socrates.

”

Should you live for your résumé ... or your eulogy? The résumé virtues are the skills you bring to the market place. The eulogy virtues are the ones that describe your character. And most of us would say that the eulogy virtues are the more important.

David Brooks
TED Vancouver 2014

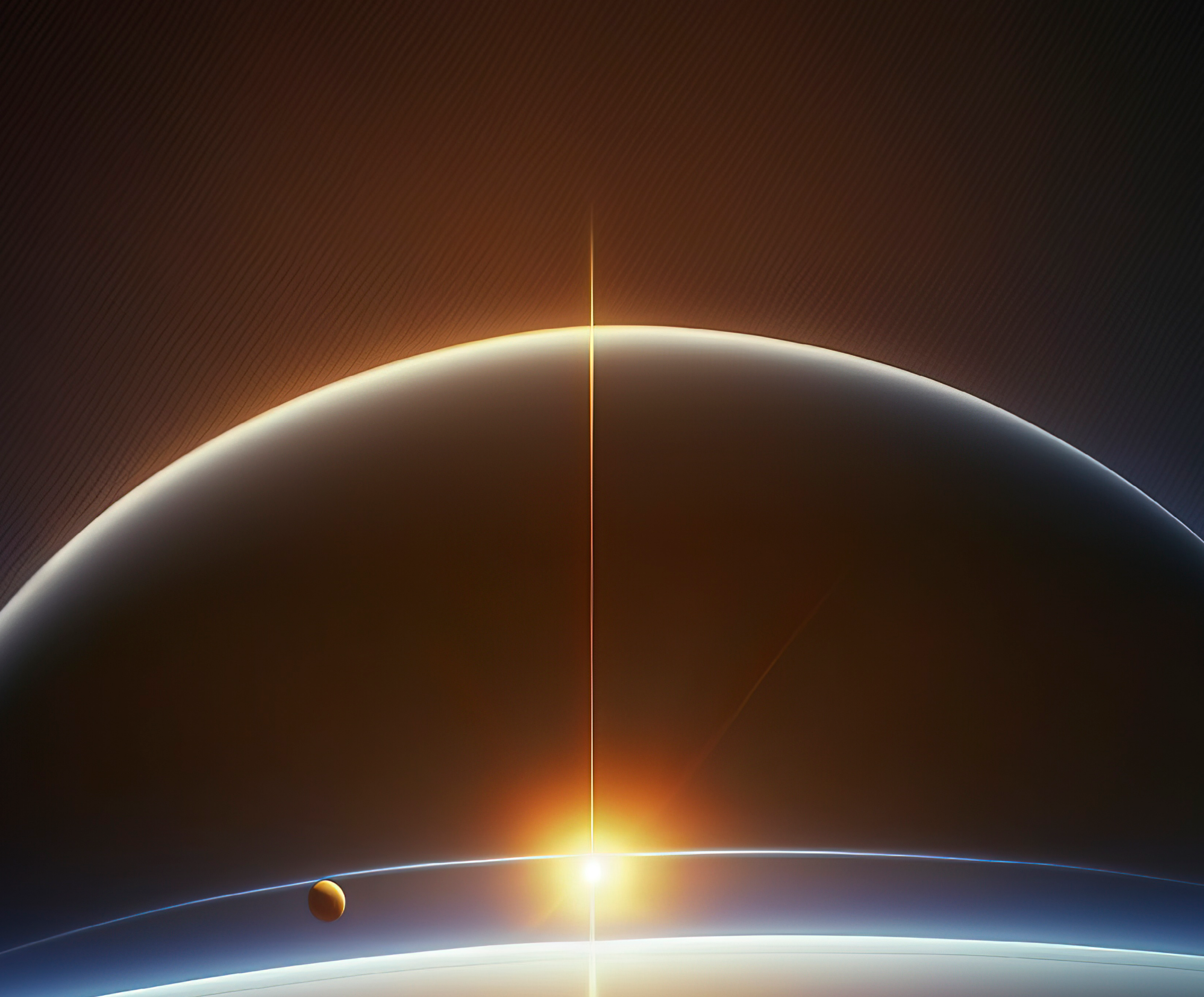


Materialization

Decide every day that all you dream of will be yours. When **you believe it – you will see it.**

When you're truly committed it's amazing what happens to create your new reality...

By following the worksheets, the Materialization of your dreams is virtually assured.



Your Reticular **Activating** System

Reticular Activating System

The Ultimate **Spam Filter!**

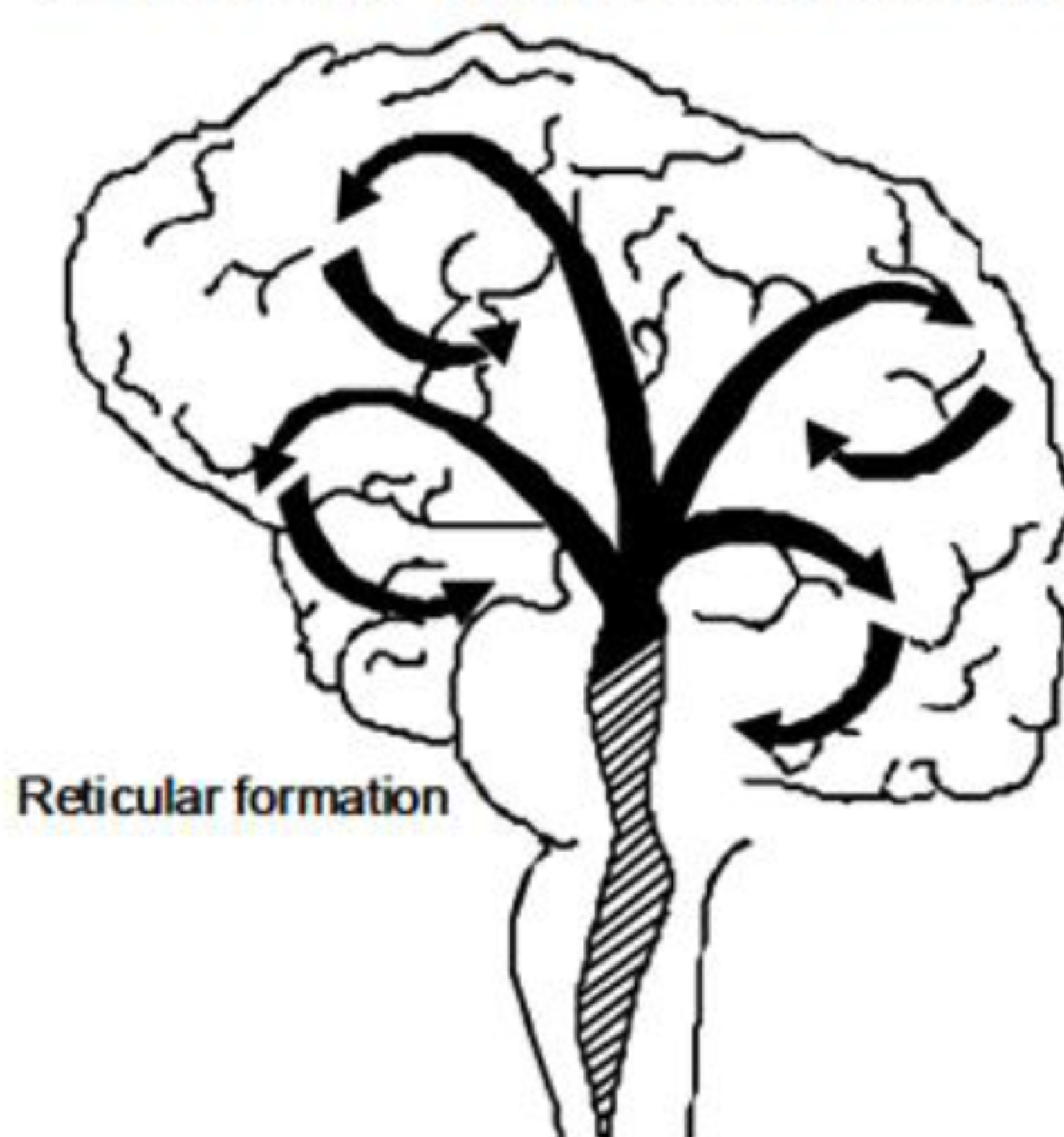
The RAS performs as a filter for all of the sensory inputs that you receive. Just think for a minute of how much activity is going on around you, what you are touching, what you are seeing, what you are hearing... Quite a lot really, all that data is bombarding you continuously.

The RAS decides what is and is not important to you and what you need to pay attention to, if it did not you would suffer from information overload. The 'filter' sits between the subconscious and conscious minds, and is programmed by the conscious mind. It is this ability to programme the filter that makes the RAS so important in achieving your goals.

It is the ability of the RAS to raise your awareness to important pieces of information that makes it an important tool in your goal achievement tool box. The RAS is not able to distinguish between real or synthetic events and

stimuli, it believes the messages it receives. Therefore it is possible to programme it by creating specific goals in your imagination, the more sensory specific you can make them the better.

RETICULAR ACTIVATING SYSTEM



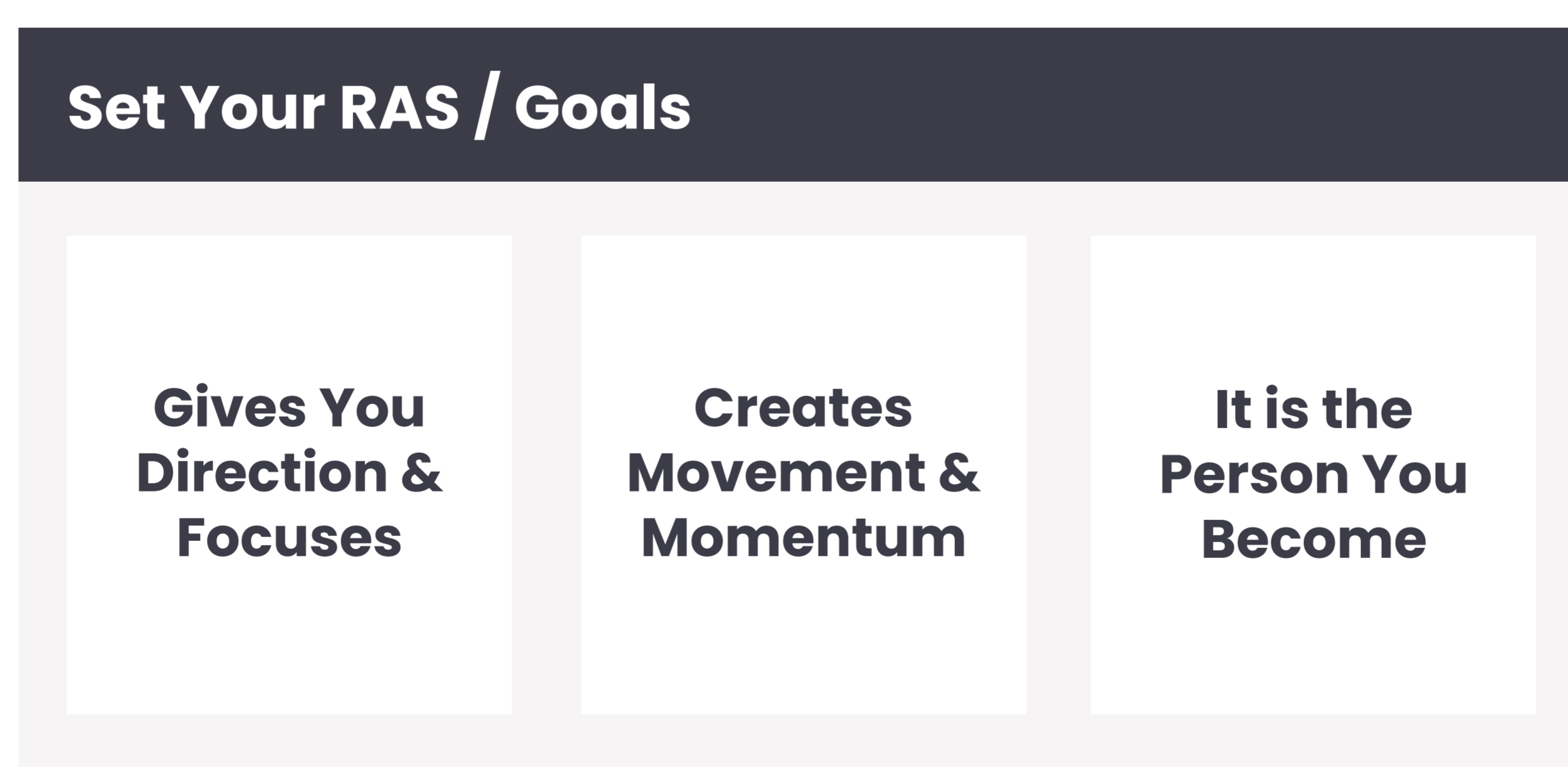
The reticular formation (or reticular activating system) is the seat of consciousness that is responsible for mental alertness, and it connects the conscious and subconscious minds.

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The 'filter' then raises your awareness to items that can assist you in achieving your goals. By thinking about, talking about, reviewing and writing out your goals regularly you reinforce the filter's programming.

To make the most of your RAS; Use your imagination to generate specific and detailed goals that your Reticular Activating System can go to work on.



**Who
must I**

Be

**What
must I**

Do

**So That
I Can**

Have

**A formula for
Life Success**

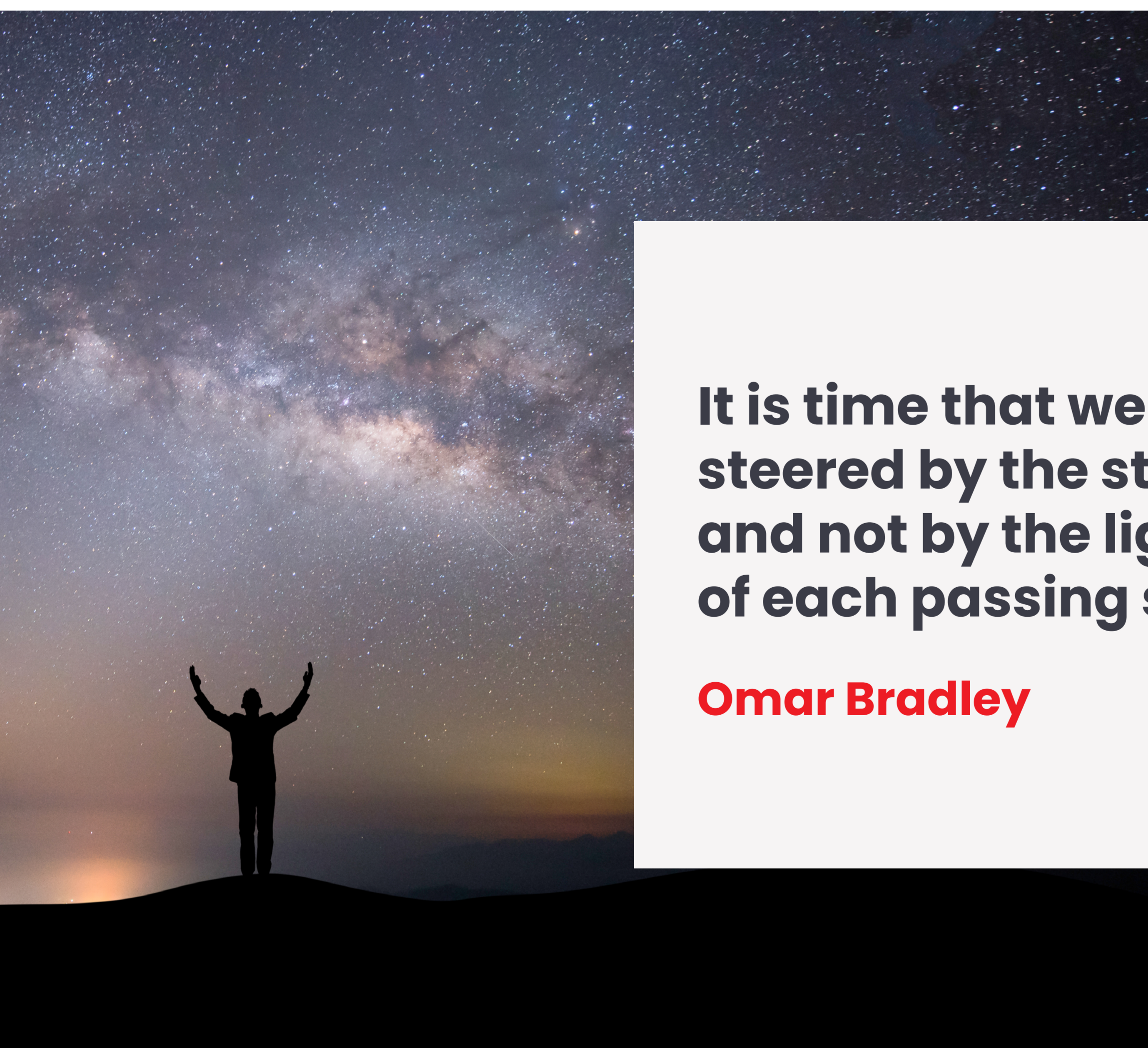
The Art of Being, Doing, Having



Most people believe if they ‘have’ a thing (more time, money, love—whatever), then they can finally ‘do’ a thing (write a book, take up a hobby, go on vacation, buy a home, undertake a relationship), which will allow them to ‘be’ a thing (happy, peaceful, content, or in love). In actuality, they are reversing the Be-Do-Have paradigm. In the universe as it really is (as opposed to how you think it is), ‘havingness’ does not produce ‘beingness,’ but the other way around.

First, you 'be' the thing called 'happy' (or 'knowing,' or 'wise,' or 'compassionate,' or whatever), then you start 'doing' things from this place of beingness—and soon you discover that what you are doing winds up bringing you the things you've always wanted to 'have.'

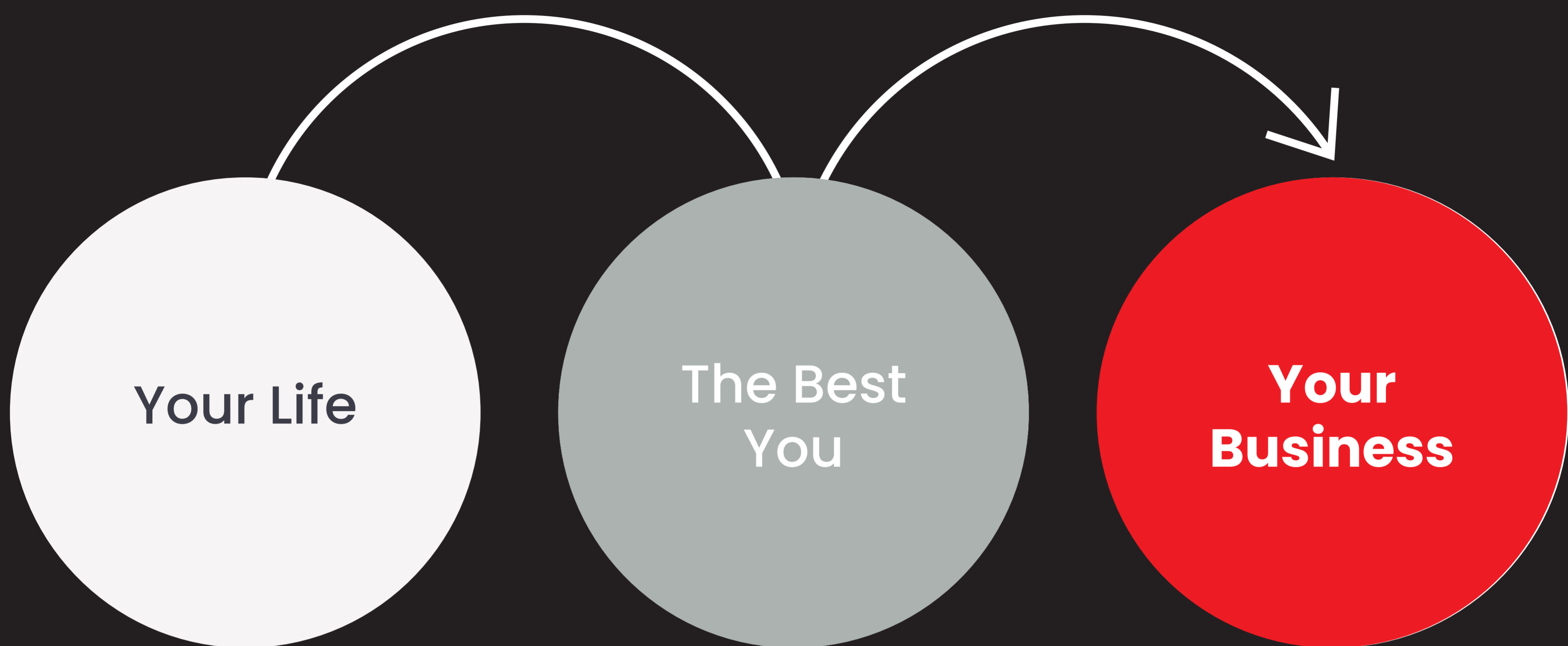
The way to set this creative process (and that's what this is... the process of creation) into motion is to look at what it is you want to 'have,' ask yourself what you think you would 'be' if you 'had' that, then go right straight to being. In this way, you reverse the way you've been using the Be-Do-Have paradigm.



”

**It is time that we
steered by the stars;
and not by the lights
of each passing ship.**

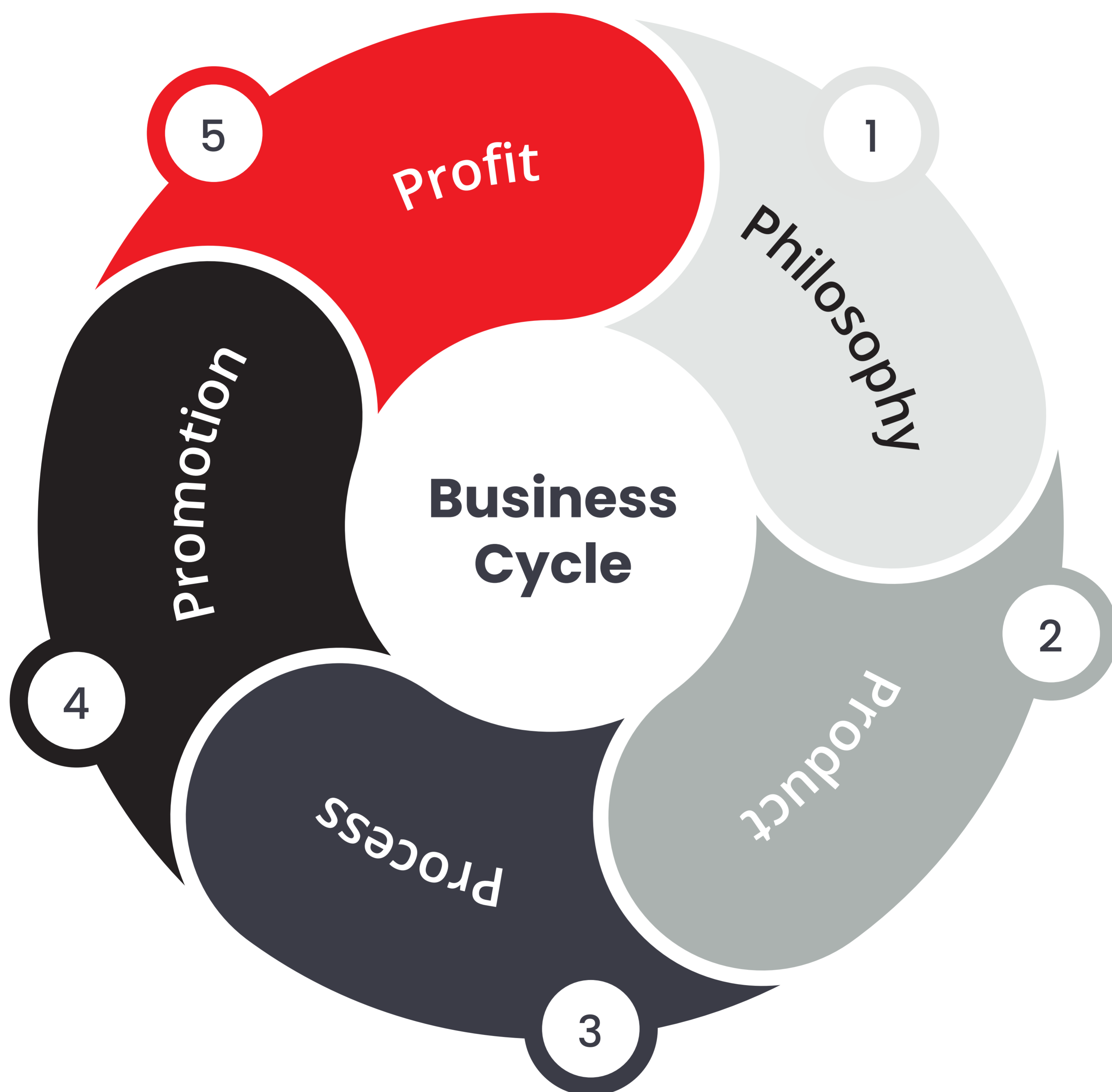
Omar Bradley

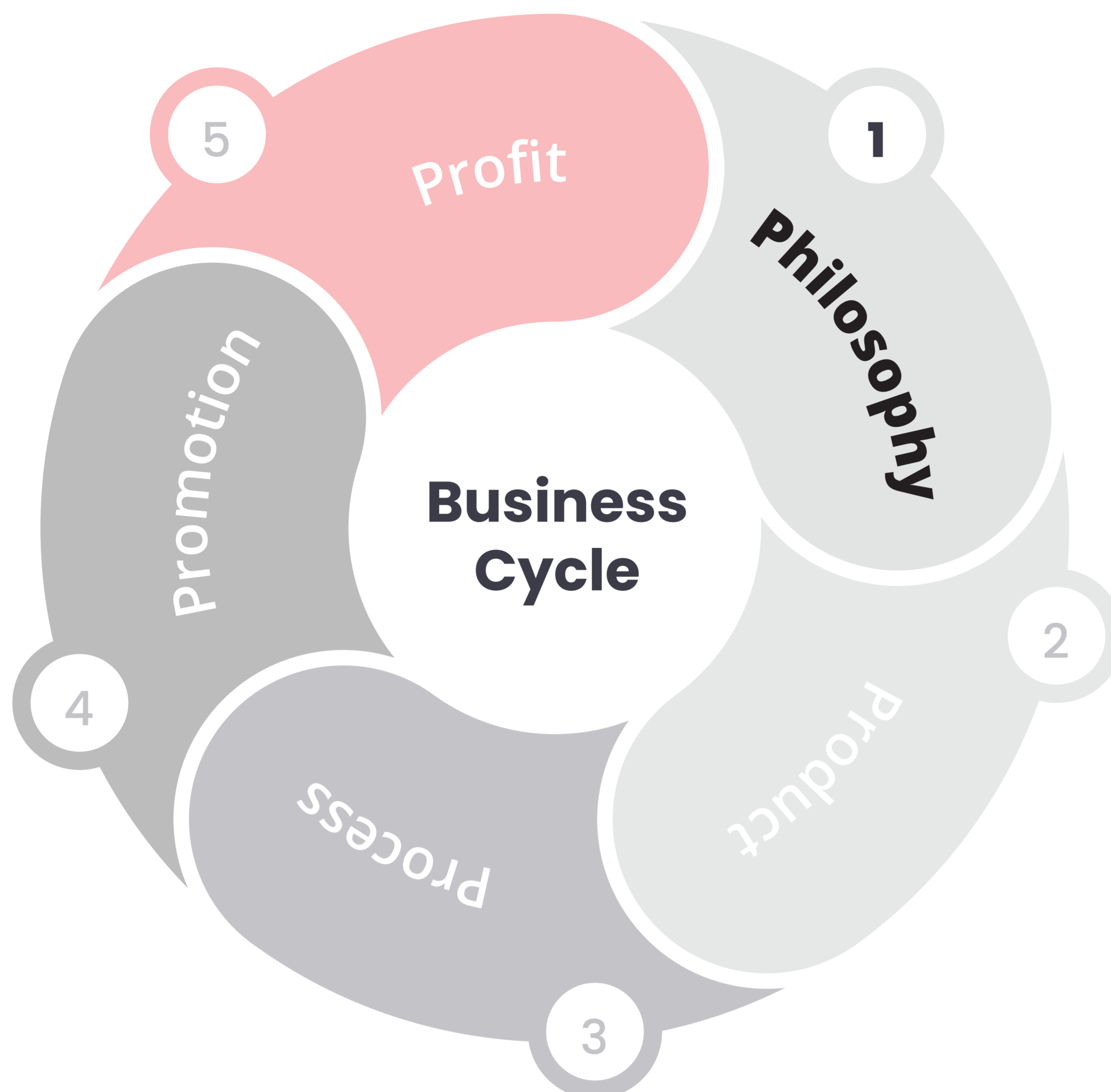


05

**And now let's
do Stage 3:
Your Business**

The 5 P's to **Grow** Your Business



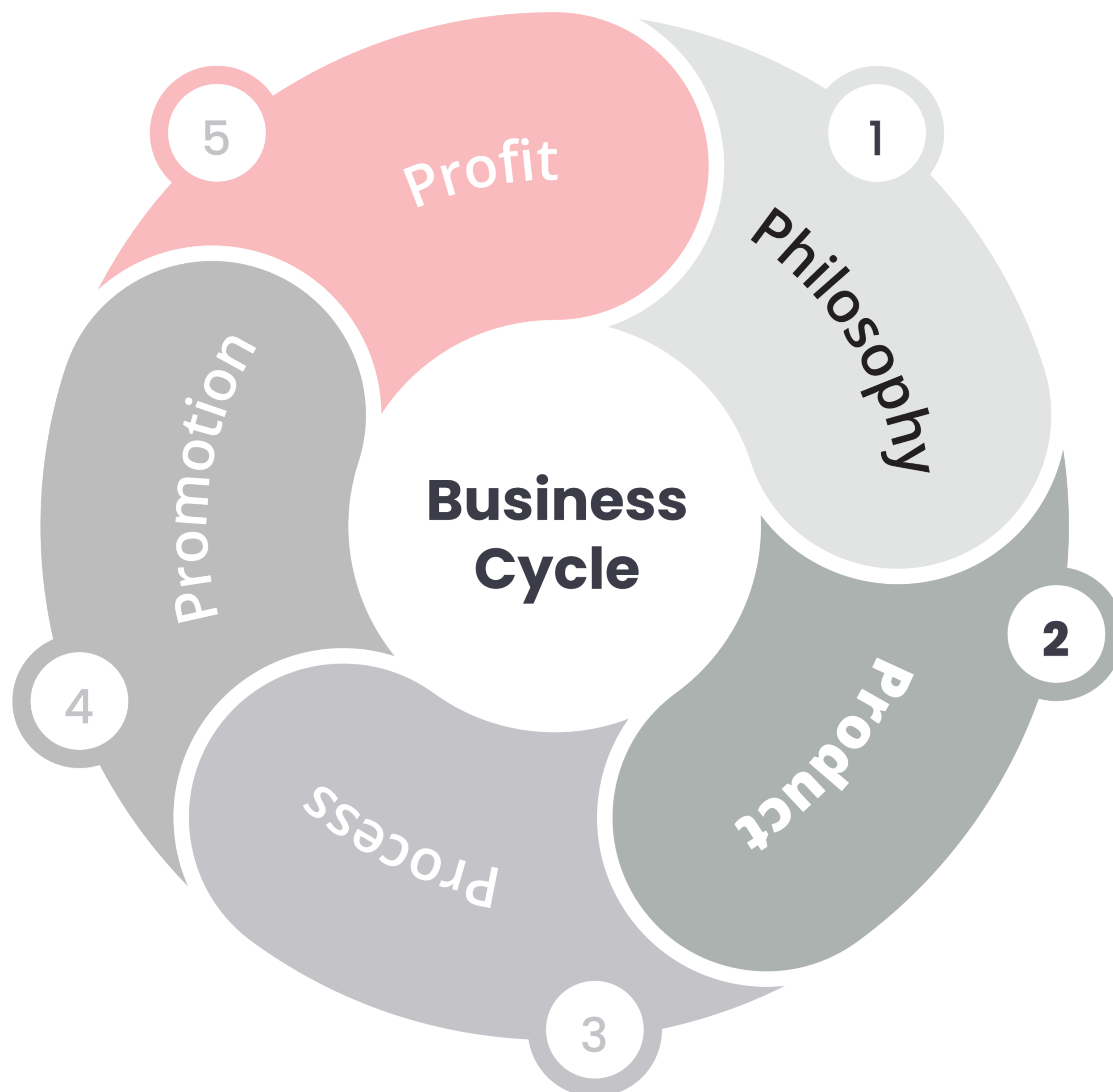


Step 1: **Philosophy**

First, a successful business starts with an idea, dream, or a vision. The business will have a purpose or a mission which, when combined with the standards, ethics, and morals of the business owner, define an underlying philosophy. It is this philosophy that will determine how the business is managed, how customers, employees, and suppliers are treated, what standards will be upheld, and how success will be measured.

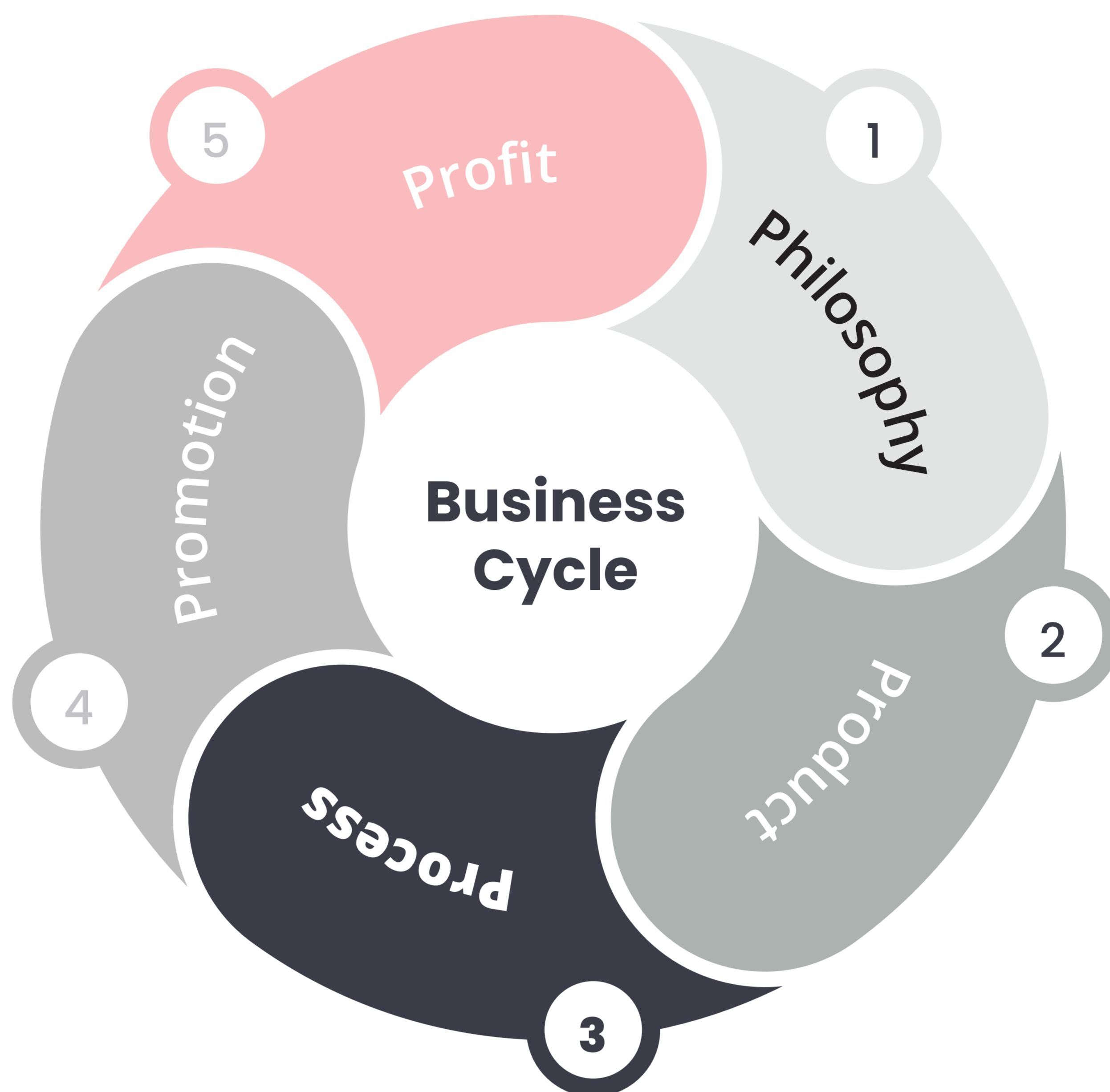
If, for example, you subscribe to the Milton Friedman philosophy that the primary purpose of a business is to make profit or, as proposed by Peter Drucker, that the purpose of a business is creating satisfied customers, your approach to business will be different. I would hesitate to say that it doesn't matter what your philosophy is, provided that it is applied consistently; however, there are a variety of different approaches that work. Which one or mixture you choose will be up to you.

A business should have multiple driving forces. While profitability, cash generation, and shareholder equity are clearly fundamental to the success of any venture, they are not the only barometers of success. A business has additional responsibilities – to provide value to its customers, opportunity to its employees, reliability to its suppliers, as well as have a social and environmental conscience.



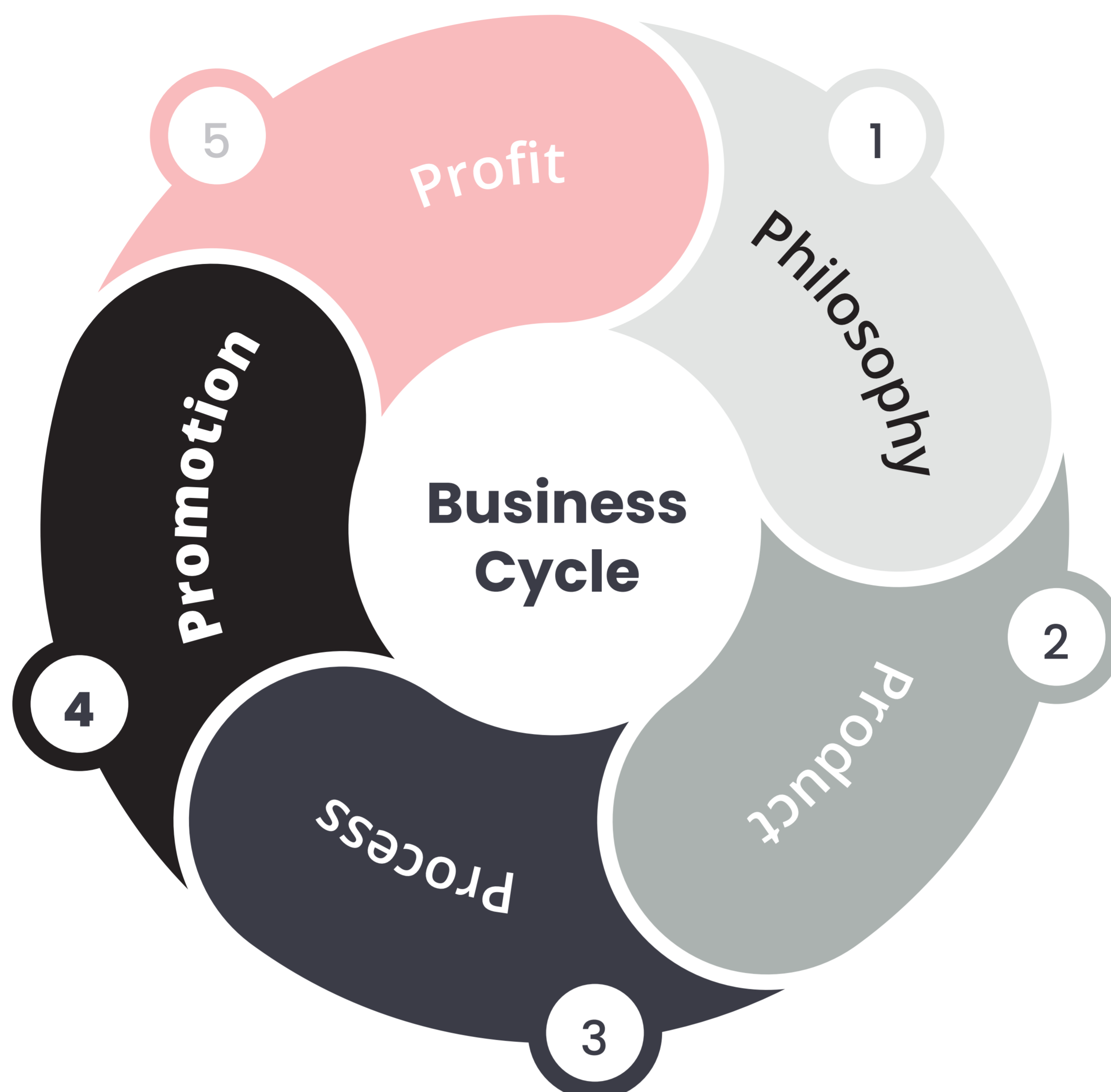
Step 2: **Product**

Every business provides a product or service, which it provides in return for cash. Which product or service is provided will, of course, depend not only on the philosophy of the owner but their skills, knowledge, interests, and abilities.



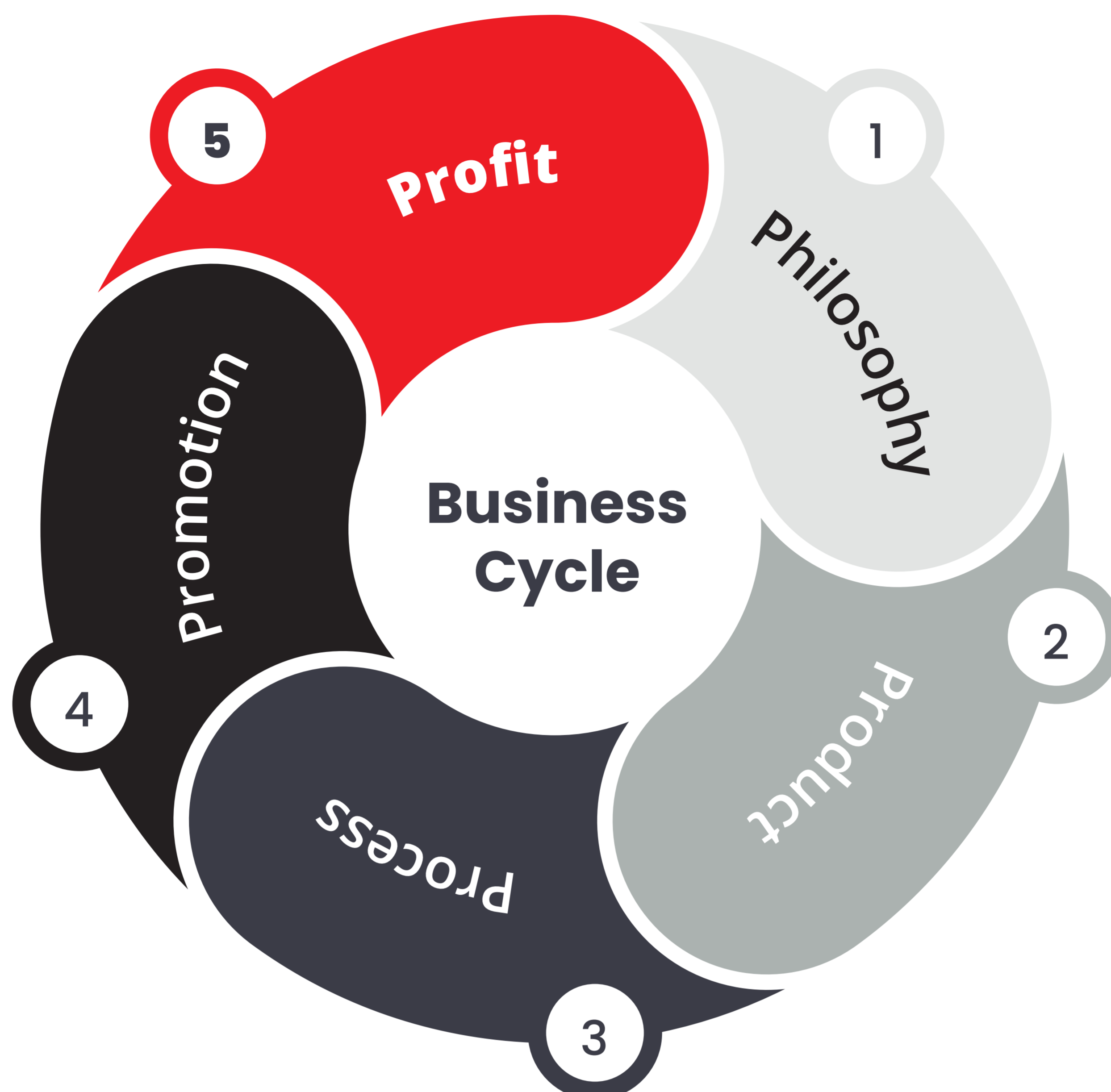
Step 3: **Process**

How will you deliver your product or service with consistency of quality and profitability? Your business process is not just about “making a hamburger.” It is everything associated with the running of the business. It is critical to systematize a business in order that it becomes successful, where your business comes into contact with your clients, there has to be freedom. Your customers aren’t interested in your systems; they are only interested in your service and products, the value they derive from them, and the experience they have consuming them.



Step 4: Promotion

Even with a great philosophy, world-class product, and a process that delivers efficiency and relationships, your prospective customers need to know about it. Your promotions should be aimed at attracting your ideal clients and should convey the philosophy, product, and process that will define the uniqueness of the experience they can expect when they come to you. Treat your marketing as a separate business division. Every dollar you invest must result in more profit to the business. If your marketing isn't achieving this, stop doing it.



Step 5: Profit

The banker's mantra states that 'Sales is vanity, profit is sanity, but cash is reality'. No business ever went bankrupt for lack of sales or profits; it is always lack of cash that kills a business. Your business is a series of systems. The output is profits and cash. If you don't like the profits you are getting, change the system. The cycle of business from shows the 'process' of running a business, and in the perfect world, the three operational aspects – product, process, and promotion – would each be the separate responsibility of an individual, team, or department.

”

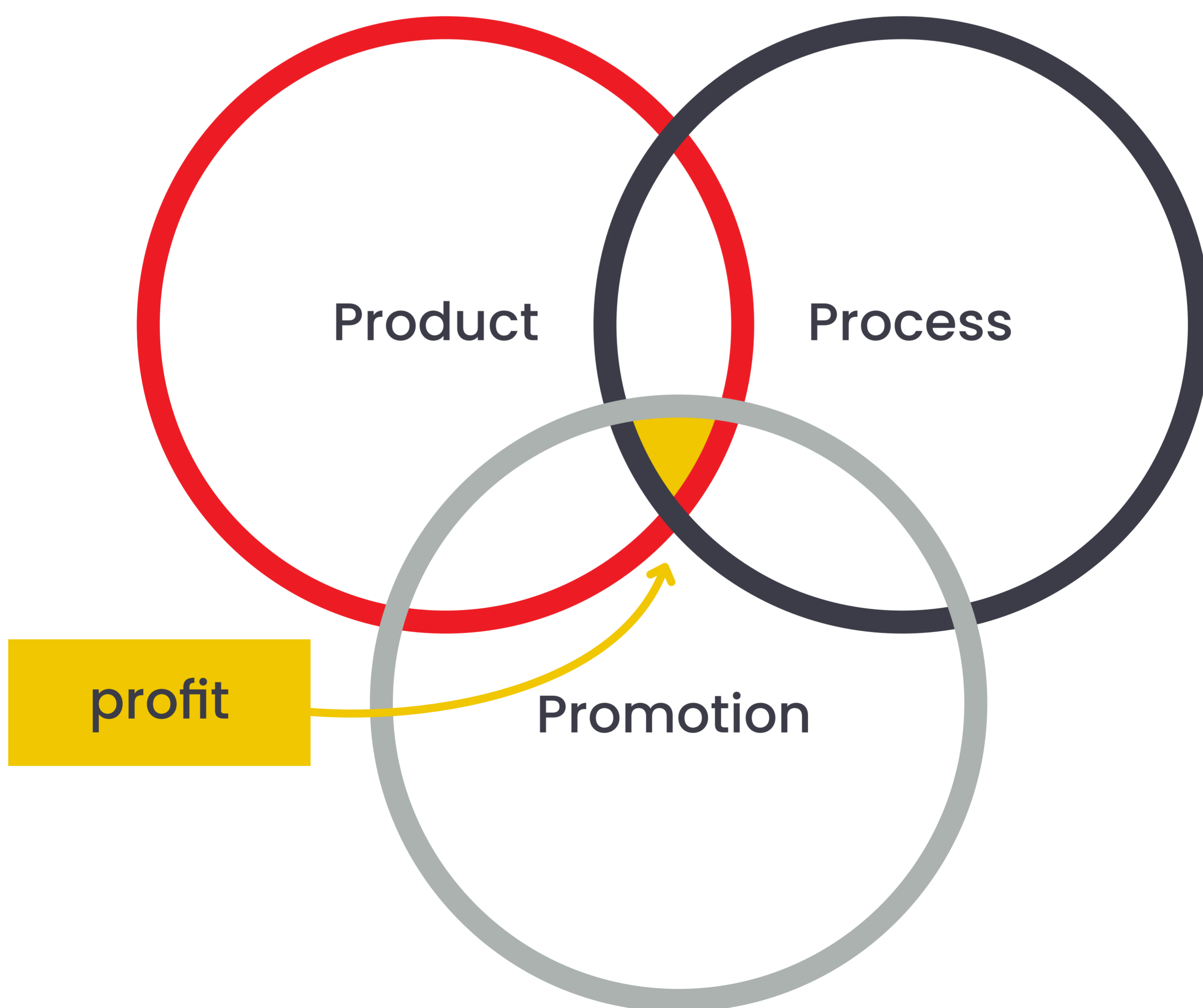
The only reason to spend money in a small business is to buy or keep a client

Keith Cunningham



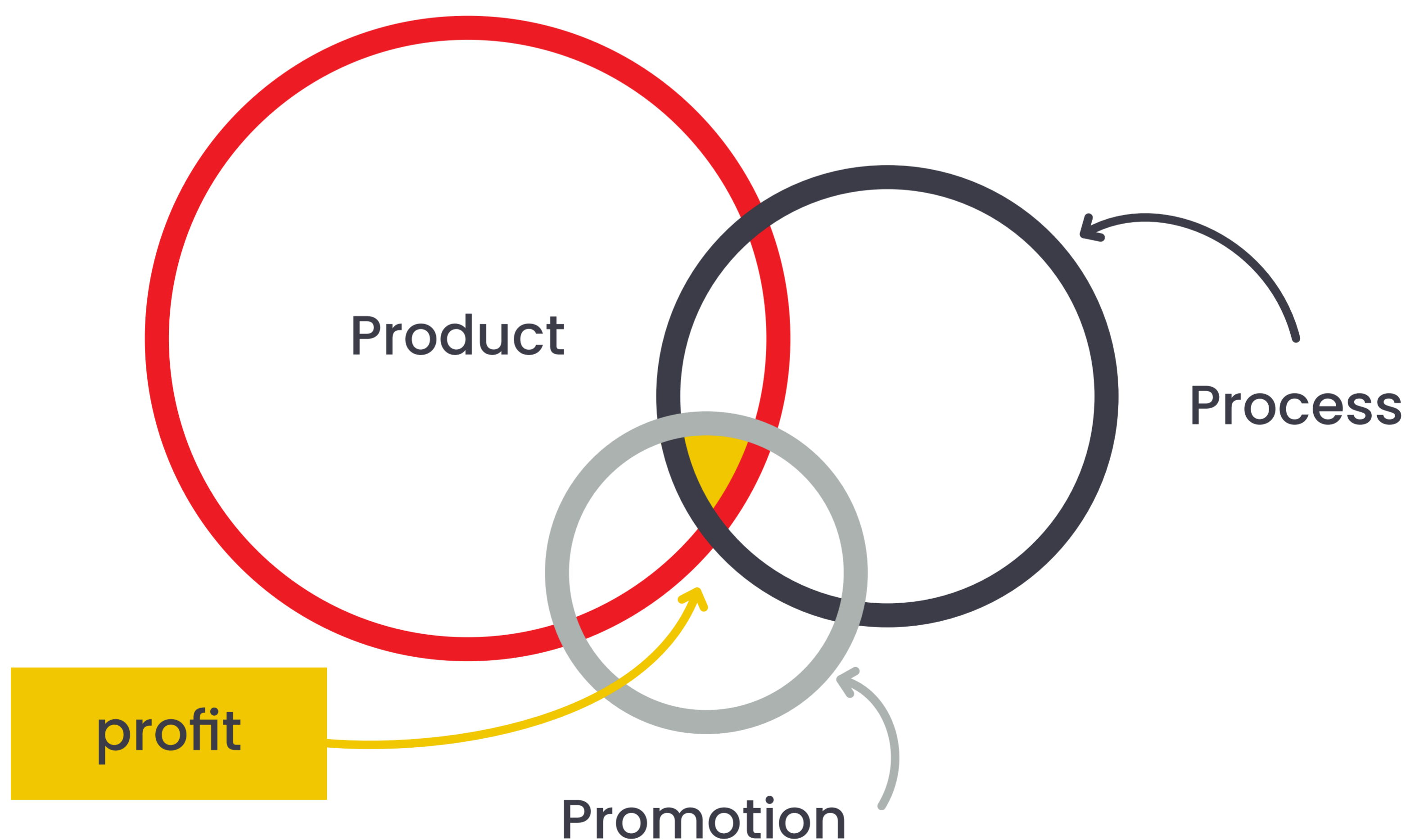
The Perfect Business..

In the “perfect” business, each operational stage of the business receives equal emphasis. Depending upon your background, experience, and training, you may find that you are more comfortable with some of the disciplines of the model more than others, and your preferences will show up in how your business runs, and the focus you and your team maintain.



The **Standard** Business..

The reality in most businesses, each step receives a different level of emphasis. Depending upon your background, experience, and training, you may find that you are more comfortable with some of the disciplines of the model more than others, and your preferences will show up in how your business runs, and the focus you and your team maintain.



The 5 P's to Grow Your Business

W5 Coaching - the 5 P's to grow your business			
Your Company Name	Date	Month	Year
Insert Your Company Name Here	0	0	0
P1 x P2 x P3 x P4 = P5		Unlock the Potential with Your Business W5 Coaching	
P1	Philosophy	Score #10	
X	Vision For Your Business	Is your Vision written down and clear to you, your team and your customers	0
	Mission Statement	Is your Mission engaging and understood by you and the team	0
	Statement of Purpose	Is your personal SoP up to date - does it truly reflect your passion	0
	Rules of the Game	Are these clear to everyone and is everyone held accountable to them	0
	Budgets and Plans	Do you have 10yr, 3yr, 12 month and 90 day plans in place - for everyone	0
	Total		0
P2	Product	Score #10	
X	World Class	Is your product or service truly world class - or does it need work	0
	Range	Is your range wide enough to allow plenty of people to buy from you	0
	Margins	How would you rate your Gross Margins	0
	Differentiation	Are you different from the competition or do you compete on price	0
	Innovation	What is the pace of your product / service innovation program	0
Total		0	0%
P3	Process	Score #10	
X	Consistency	Is your customer service reliable - no matter who serves the customer	0
	Systems	Could I walk into your business and run it by using your documented systems	0
	Training	Do you and your team have regular weekly training events	0
	Test & Measure	Do you record all feedback and monitor corrective actions	0
	Shock & Awe	Do your customers always leave with a sense of positive amazement	0
Total		0	0%
P4	Promotion	Score #10	
=	Leads	Do you have a consistent flow of quality leads	0
	Conversion Rate	Are you happy with / do you know your conversion rate	0
	Referrals	Do you get a constant stream of referrals	0
	USP	How clear is your USP to your customers and your team	0
	Strategies	Do you use enough strategies to get leads (Hint 15 is 10 out of 10)	0
Total		0	0%
P5	Profit	Put Your Anticipated Current Profit in this box	\$0
Improving P1 to P4 by just your selected 0.00% means your profits could to increase by			0%
Which would result your profits improving by			\$0
Giving you a new Profit Total of			\$0

In your workbook, you will find this tool which will help you analyze which of the 5 P's are working well and which ones are challenged. To achieve the best results, the 5 P's have to be managed and maximised, and the structure of the business itself may need to be overhauled – challenging the philosophy of the founders.



”

The man who stops advertising to save money is like the man who stops the clock to save time.

Thomas Jefferson

The 5 Steps to **Freedom** System



Freedom -
Reproduce, Acquire, Harvest



Prosperity -
Economize, Invest, Repay



Control -
Organize, Measure, Adjust



Disorder -
Invest, Drive, Grow



Creation -
Research, Model, Launch

**Creation** – Research, Model, Launch

When you're beginning as an unknown in the marketplace, you're researching a viable niche in your market, developing a working prototype of your business model, and launching the model. From there, you move to...

**Disorder** – Invest, Drive, Grow

This is when you begin pushing through the often bloody battle of becoming cash flow positive by investing heavily and driving growth like crazy to build brand awareness, to grow and capture market share as quickly as possible. Sadly, only a small percentage of businesses make it past this step.

**Control** – Organize, Measure, Adjust

This is where you convert cash flow into profit by stabilizing and organizing your operations, measuring your well-chosen performance metrics, and fine-tuning and adjusting the business model. This allows you to reach.

**Prosperity** – Economize, Invest, Repay

Your goal here is to solidify a position of dominance in your niche market by economizing and optimizing for efficiencies so you can continue investing in growth and repay debt. When you've reached this point, you can start enjoying the fruits of your labor as you head into...

**Freedom** – Reproduce, Acquire, Harvest

Your final act is to reproduce yourself and develop a strong core of leaders who will continue to grow the business through partnerships, joint ventures, and acquisitions. At this level, the business owner enjoys the fruit of his or her labour in the form of free time and free cash flow.

Freedom System: Silver Bullets

01

Time

Most of the challenges facing business owners are related to Time, Team, or Money. And by money, I mean both the financial, banking, accounting aspects of money as well as those related to sales and marketing. It is about both “where is the money” and “I need more money!”

- › Apprenticeship Plan
- › Operations & Training Manual
- › Time Management Plan
- › Comprehensive Exit Strategy
- › Delegation Skills

02

Team

That’s where our Silver Bullets come in. You’ll learn how to predictably and systematically overcome the three areas of pain or challenges in any business. And you’ll use the 22 Silver Bullets to do it. The list of Silver Bullets are on the following page. You’ll use our unique, step-by-step, “How To” Guides for each of the 22 Silver Bullets.

- › Employee Acquisition Plan
- › Psychometric Profiling Process
- › KPI System

- › Lean Manufacturing Program
- › Performance Incentive Plan
- › Strategic Plan
- › Leadership Development Plan
- › Team Meeting Rhythm
- › Organizational Plan
- › Team Building System

03**Money**

So you can work through the process of solving your real business problems.

You'll LOVE our strategic planning tools and our Money Mastery XL-based tracking tool to ensure that you now have mastery over both sales and expenses, so you never overspend your budget or knowingly underperform your sales projections.

- › Current Business Plan
- › Break-even Plan
- › Revenue & Profit Budget
- › Cash Gap Plan
- › Unique Selling Proposition & Guarantee
- › Sales Management System
- › Tactical Marketing Plan

Silver Bullet Score Card

This Score Card has been designed to help you evaluate your implementation of the Silver Bullets in your business. Please rate your business on a scale of 1 – 5 for each of the Silver Bullets.

The score card is in your workbook!

W⁵ Coaching	
Silver Bullet Score Card	
Business:	Owner:
<small>Directions: This Score Card has been designed to help you evaluate your implementation of the Silver Bullets in your business. Please rate your business according to the following a scale for each of the Silver Bullets. (5) Excellent/Always, (3) Fair/Sometimes, (1) Poor/Rarely. Deliver the completed Score Card to your coach when complete.</small>	
<small>Excellent/Always = 5</small>	<small>Poor/Rarely = 1</small>



People always over estimate what's going to happen in the short term & underestimate what happens in the long term.

Bill Gates
on Planning



06

The **Freedom** **Planning** Workbook

Freedom Planning Workbook

Along with this book there is a workbook that has all of the tools I've described. The workbook has instructions along with the ones found in this book!

Freedom Planning	
Directions	
1	List your success and things to be grateful for!
2	Click on the Input & Graphs Tab in the lower left hand corner of this spreadsheet.
3	Fill in your name, telephone number, email, and date.
4	Then rank the 8 categories in the orange column on a scale to 1 to 10 in the light green cells. A 10 is considered optimal, a 1 least desirable.
5	Do a SWOT analysis. Go to the appropriate level of detail for each of the 8 Categories
6	Now specify where you want to be in six months from now in each category on a scale of 1 to 10.
7	To clarify your goals action steps, go to the Goals Worksheet tab by clicking on the tab in the lower left corner of this spreadsheet.
8	Begin to identify the goals and resources needed to bring that category to an 8 or above.
9	Complete the Paired Comparison Analysis
10	Place your top 10 goals in ranked order & investment needed
11	Complete Silver Bullet Score Card
12	Complete Budget or Revenue Plan
13	Complete I Am's and IVVM
14	Diary Planner to schedule Action Plan Steps
15	Complete Skill/Fun box and/or Competence/Passion Exercise



How to get the most from your planning:

- › Find a time/place where you can be relaxed.
- › Pick time of day/week where you are at your best.
- › It will like take a couple of sessions, each of about 2 hours to complete the workbook.
- › To help you achieve your plan, get an accountability partner.

”

Some people are disturbed by those tough days because all they have is the days. They haven't designed or described or defined the future.

Jim Rohn



Freedom Planning: How to **Make** Your **Business Serve** Your **Lifestyle**

Instead of the Other Way Around.



Since 2004, as a professional business coach, I've taken over 250 clients through a systematic process that helps them increase profit, remove the stress and chaos from their businesses and get their lives back. At W5 Coaching we employ the Socratic style of leadership and teaching: a method of teaching by using questions to arrive at the right answer for YOU.

If you want to contact John

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