

Called to Both Episode 41 - Transcript

It is officially December. And that means as business owners, we're thinking about the upcoming year ahead. I know I'm also thinking about how I'm going to take some time off, step away from my business be with my family. But before I can do that, I need to take some time and plan for next year. And as someone who loves to hear about how other business owners are planning and goal setting, and reflecting on their year, I thought it might be fun to share my process with you today. So I want to share with you what I'm doing in my own business in this area as someone who has run a business for almost 10 years, which is crazy to say 2023 is going to be my 10th year in business. And my business looks very different than it did when I first started, which I think is pretty typical when you've been in business for a decade. But I am just floored and honored and happy and grateful to still be in business honestly, going through so much, especially the past couple of years. It's it's truly remarkable to still be here and I have a lot to reflect on.

So I want to take you through some of the steps that I am taking in my business this year now here at the end of the year to go forward and put my best foot forward and hopefully plan for my best business year yet. This episode is brought to you by HoneyBook. HoneyBook is a client management software. And it's the tool I've been using for years to send contracts get paid, and how I keep track of all of my client inquiries and projects. Now before I moved over into HoneyBook, I was actually just using my email inbox to manage my clients and things were slipping through the cracks. Now inside of HoneyBook, I can see at a glance exactly where my projects are in a timeline. And I love that I can use this for sending questionnaires, setting up recurring invoices, and book calls through their built in scheduler tool and so much more. I even use honey book to book guests in for my podcast because of how I can set up workflows and automations so easily. And I use the scheduling tool for that as well. You can get 50% off honey book and start using it today using the link in the show notes below. Hello, and welcome to the call to both podcast. I'm your host Joy Michelle, and you're in the right place. If you're ready to grow your business, while also being the intentional and present mom, you want to be this show will leave you feeling inspired, equipped with tangible tips and encouraged to go after your own version of being called to both. Let's dive in.

So I actually have a fair bit of content to share on this topic. So I'm going to break this up into two episodes. So today is going to be part one, I'm gonna give you four key steps that I like to take in my planning process that have really helped me over the past couple of years as I've honed this process. And that I think that will really help you if you implement them into your business. And I highly recommend that you listen to this series before you take your time to plan this year, if possible. And if you've already taken some time to plan, that's okay, you can always do more planning, right? I'm a big proponent of planning. And this doesn't have to just be for annual planning, I think you can implement some of the things that I'm going to talk about here today into your quarterly planning or your monthly planning as the steps make sense. Okay, so let's start with step one. The first thing that I recommend that you do is set aside a dedicated time to review for your business. So truly mark off the calendar of when you're going to take the time to plan goal set and basically mark off a CEO day or a CEO weekend in your business.

Now, I actually have a video like a whole vlog that I created a couple of years ago of exactly how I did this, I rented an Airbnb, I stayed for two nights. And I set up my calendars and had basically what I'm

going to walk you through happen in this video. So if you want to see how this could actually look and watch as I go through a planning weekend in my business, you can actually check that out. I'll put it in the show notes, I'll put a link to the video where you can watch the vlog of my planning weekend. I was actually pregnant with Louis during the time. So I was planning for a year where I would have a maternity leave. So I talked about that a little bit as far as content and teams and all of that. So if that's interesting to you, definitely check out that video where I share more of this planning process. But I think that there's such value in getting out of your normal area of where you work. If you can get a hotel room, that'd be great.

If you can just go to Panera, or Starbucks for like four hours and really set aside some dedicated time. This is going to make a huge difference. I think it's so important for our brains to get out of that regular space of where we work. It kind of helps to will bring you back alive and help you to focus on the task at hand. And I know that I'm far less likely to get distracted with other projects or other things that are pulling and vying for my attention. If I'm away to plan, like, I know that I booked that hotel room so that I could reflect on the business and set goals for next year. So it's easy for me to stay on task if I do that. But I've also had years where I couldn't get away for long chunks of time because of budgetary restrictions, or I was breastfeeding or the time just didn't work out for me. And I was able to still accomplish this over smaller chunks of time over more days. So whether or not you take the weekend or not, I don't think that is a make or break thing. I think the point here is to really set aside the time in a way that makes sense for your season, your budget, and your business. Okay, step number two, in this planning process, is to gather all of the data and materials that you're going to need. So before you can actually sit down and perform a review and set goals and do all of these things in your business, you're going to need to have a few key things. And I like to have on hand a business profit and loss statement, the goals that I set the previous year, any surveys that I have done with my audience that year. So I love to do an annual survey at least once a year, I use type form, I think, for that survey, and I put it into my Facebook group and my email list and things like that. So I take those results too.

And I like to have any marketing metrics that I have recorded throughout the year. So I've gone through different ebbs and flows in my business of recording things really closely. And then sometimes I really don't like if I'm being completely honest, that's not always been my most consistent thing. But there have been times where I'm really, really closely watching certain metrics. Just in a spreadsheet, I'm looking at Facebook group growth, I'm looking at my Facebook group engagement rates, I'm looking at email downloads, understanding how people are coming into my audience, looking at Google Analytics, how certain blog posts are performing in search, things like that. So whatever is important to you and relevant to your business is important to have available before you sit down for your planning time. Because you need to be able to have this easily accessible so that you can devote the time to really getting into the information and not spend the whole time trying to find this information, right. If you don't know how profitable you are, it's going to be really hard to plan and really make decisions honestly. And that's why it's so important to have this information in front of you, you need to have this data, we need to have your customer service information so that you aren't being pulled to your computer constantly. And you can really look at this stuff with as little distraction as possible.

So you might need to spend some time requesting a report from an accountant, a CPA, an SEO manager, you might have to export some data from Google Analytics, do whatever you need to do before that actual planning event. So this data gathering phase is so important. And I try to print as much of this as possible because I find it less distracting to have a physical paper in my hand where I can highlight I can make notes. And I'm not on a screen, because I never quite know how but I always

end up clicking on some kind of distraction, I'll get a voice message or get a text message I will want to check in on the kids, I want to do something and it kind of brings me out of what I'm supposed to be doing. So little sub tip for this is try to get as much of this in your hands physically as possible to reduce distractions. Step number three in planning for your business is to set your planning agenda. Now this is kind of meta, right? Like we're going to plan before you sit down to plan but stay with me here, I have a literal checklist of things that I want to review, assess, dream about decide all the things before actually sit down in Panera, or in my Airbnb or at that hotel. I don't leave the planning time itself up to chance. So if you show up, and you just hope that you come up with awesome ideas, and that you are able to set amazing goals that are great and measurable and realistic, but also ambitious. It is not going to be the most productive time that you spend, or at least it's kind of a roll of the dice at best.

So your planning time will look different depending on your business. But I think when you're planning out the timeline and really thinking about what this time should look like, it should contain three parts. You have to have a review and reflection phase right. So the first step is to review and reflect you get all that data you look at the numbers. You look at your testimonials reviews, your highs and your lows and The next step is celebration. And I have skipped this. But honestly, it is a huge mistake to just brush past everything that you've been through the past year. And I know that sometimes I sit down and I think, Okay, I'm going to come up with these amazing goals. And we're going to figure out a plan, we're going to set a revenue goal, we're going to figure out how we're going to reach that revenue goal. It's like I go straight to the strategy. But celebration is so important, and especially when you work for yourself, especially when you lead a team. And it's, it's really you at the top by yourself, being the visionary being the leader, you have to take a minute, and put your year like sit back, get your feet off the gas pedal for one second, and just relish in some of the things that you've accomplished throughout the year. It's so important. It's such an important part of this process. And it's something that I think a lot of us skip. And then step three is to start to actually look ahead, goal set vision cast, and then spend some time in your calendar looking at the year ahead.

So that's kind of like the three part how to set up the time how to allocate the time during this planning block that you have, you review and reflect, you celebrate. And then you move into the Looking ahead, the vision casting the goal setting and the calendar time. And I think you'll see some of this in the vlog that I list in the description section. So if you want to watch how this weekend kind of unfolds, this planning goal setting CEO weekend, you can see how I broke this up where I'm reflecting where I'm looking at data where I'm you know, taking some time to celebrate. And then when I move into the actual goal setting and the vision casting, so you can kind of see this play out in that video. And it's it's a really cool method. And I think it's so helpful to give yourself this time and not rush straight to Okay, let's set goals for 2023. Because that's asking a lot without all this, like lead in of having the appropriate data in front of you. So I do all of this inside of notion. That's my project management tool of choice, whatever makes sense for you. But I encourage you to actually put some checklists together some times on the calendar, like have a schedule of how you want your day to go. So if you are going to be at a hotel and you are going to start your day, at eight o'clock in the morning, you're gonna grab some breakfast, you're going to jump into your first task really outline what you should be doing at any given time.

And what I liked about this is that, I want to make sure that the whole review and reflect portion doesn't take up the entire planning time that I don't get stuck in the numbers or I don't get stuck trying to interpret, like all this different data or, you know, metrics that don't matter as much as I think they do. And I know that by a certain time, like let's say 11am or 12pm, that day, I need to be moved on to the

next stage. Regardless of how I'm feeling I need to be moved on to the next stage. So really keeping yourself accountable so that you don't go and sit down to plan your business for the next year. And then, you know, you kind of get lost in like some analytics, and then you look at like a bank statement. And then you think, okay, yes, this was great. We got a couple good reviews. And then it feels like Okay, where did the time go? I didn't actually sit down. And that's why I think it's important to have a schedule of what you are wanting to accomplish at what time. I also think it's really helpful if you plan out where your meals are going to happen. If you're doing an actual day, I love to order in like some DoorDash. And I set that as like a reminder on my phone like, Hey, by 11am Let's go ahead and you know, order something, because it might take an hour for it to arrive. And I know by the time it arrives, I'm going to be ready for a break and really scheduling in some breaks, like when am I going to go you know, for a walk? When am I going to listen to a podcast? What am I going to stretch my legs and making sure that you really pace this out for yourself so that you can be in the best headspace to make really great decisions from a place of abundance from a place of relaxation and peace about your business and not stress and anxiety over your business. Alright, so I've given you a few tips for the actual day like leaving your house finding somewhere new and different so that your brain is kind of brought out of its regular rhythm. And you can think about your business in a new way.

We've talked about creating a timeline of exactly what you're going to do so that you actually are able to get to all of those things. And then I talked about ordering your food and planning your meals so that you're feeding yourself and this is actually a fun thing, right? And that kind of leads me into another couple of tips that I have for you. One of which is to make it fun. So you know yourself you know how you like to work. You know how often you need breaks, you know where you'll be most inspired. I know that if I rent an Airbnb that is on the water somewhere in Annapolis, I am going to be living my best life, I'm going to be so happy there. If I'm within walking distance of a cafe, and it's quiet, I'm happy. But you might want to be in the mountains, you might want to be in a loft, you might want something completely different than what I need. And I think making it fun is really knowing yourself, knowing how to reward yourself. Like once you get through some of the profit and loss statements in your business, maybe you want to take a little break, maybe you want to watch an episode of your favorite show, or listen to your playlist and have some of your favorite coffee while you're doing these tasks. And then just breaking it up and making this a fun thing because I think running your own business can be so much fun. And sometimes we can forget that in the ambition in the grind of it, we can forget that it does not have to be so grueling. So make it fun, find a way to make this fun. And then the other tip that I have for you is to get fully ready for the day. For me, this is hair and makeup, this is putting on shoes, I swear, I embody a whole different vibe. When I do this, when I wear heels when I am feeling like I could just film a YouTube video or I could walk in, you know, into a restaurant and feel like I'm not sure to dress down to be there. I just embody a different feeling in my business.

So by the end of the day, I am totally going to be in sweats. And that's awesome. I'm going to pour myself a glass of wine. And I'm going to be in comfy clothes by the end of the day. But I'm going to start the day in heels for absolutely no other reason than wanting to feel like the boss that I am. So really make sure that the way you prepare yourself for this time is super intentional, and you're taking care of yourself and you're getting yourself ready. And you're doing the work so that you can feel awesome and you're coming from that place when you're moving into the actual goal setting. So next week in the next episode, we're gonna go over the next crucial steps of this planning day. So subscribe, make sure you don't miss out on next week's podcast, because we're going to be breaking down part two, and I can't wait for you to hear these next steps. Thank you so much for listening to the show. If you enjoyed this episode, please help me get the word out about the call to both podcast by taking a screenshot of this

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