

Called to Both Episode 42 Transcript

Alright, let's talk about planning and setting goals in your business. This is actually part two of our planning and goal setting series. If you haven't yet listened to part one, just head back to Episode 41. And give that a quick listen and then jump back into today. In Episode 41, I went over the four crucial steps to planning and then the actual success of that planning day. So I am a huge proponent of a planning weekend or a planning block where you can actually sit down and spend some time as the CEO of your business. So those were four crucial steps. But today, I want to get into the two final steps, one of which I think is the most overlooked step.

So the first is the actual setting of goals in your business. So I want to break this down a little bit and share how I go about setting goals in my business, because I think everybody has a different approach to this. And I want to share with you what that looks like now going into my 10th year of business and how it looks a little different than it did when I first started out. But I also want to talk about the crucial activity at the end of your planning day after you've set your goals. After you've done your planning, you have your vision for the year, and the step that is often overlooked. So I want to break these two things down for you today.

This episode is brought to you by honey book, honey book 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 spoke. Let's dive in. Okay, so I want to start with a goal setting piece. There's a few resources that I want to share with you that have really, really helped me. But first, I want to give you some simple tips for winning with goals. I know that I have set a lot of goals in my business. Some of them I have accomplished a lot of them I haven't sometimes I think when it comes to goal setting, we can be drawn into other people's goals, we can be oftentimes making goals that don't actually align with our life values and our vision. And it can kind of be messy, right. So if you're someone that feels like you like setting goals, you like the idea of planning in your business, but sometimes it can be a frustrating process, I hear you. And I want to share some simple tips with you. My first tip is to set less goals. I think sometimes we have way too many goals.

And this is something I'm totally guilty of. I used to have 1015 goals for the year. And the longer I've been in business. And the longer I've been alive, the more I have realized, I really don't think I can be that effective at that many things at the same time. Like I can do a lot of stuff. But I don't think I can do

12 epic, amazing, awesome things in one given year. For the most part, like that's just not setting myself up for success.

So set less goals. This is actually interesting because the more that I've done reading on goals, the more that I have done exercises and worksheets on goals, the more that this is supported, I actually have a resource that I'm going to share with you guys in the blog post for this episode and in the show notes for this episode from Michael Hyatt. So love Michael Hyatt amazing author, I read a lot of his books, but he also has a lot of vision casting and goal setting worksheets on his website. And so I'm gonna leave the link for that down below. And I followed these for the past few years and they've been really, really helpful at helping me to like hone in on what goals are worth pursuing what goals are worth writing down and keeping. And one time when I was doing one of his worksheets, they were encouraging me to like write a lot of different goals down and then really whittle them down really make sure that they're attached to a life vision that the why is deep enough that the steps can be outlined enough that it makes sense for me to keep it.

So sometimes as you're creating goals, it is okay to go and say, Okay, if I were only to get three of these done, like I have 10 here, but if I could only do three, that is going to help really guide you as to like what is truly most important. So make sure that you set less goals. And then sometimes you have to eliminate and get a little bit ruthless with the goals that you do set. If you're someone that it's easy for you to just throw a lot of things on a piece of paper, and harder for you to actually know what's truly important. The other thing that's helpful is set goals that you can control the outcomes of completely, or at least you can write down the actions that you are completely in control of. So sometimes it can be tempting to write a goal like, Okay, I want to reach 100,000 subscribers on YouTube, or I want to reach \$100,000. In my business, I want to have 1000 newsletter subscribers, okay, great goals. But these are metrics that are largely outside of your control. So one thing that I've started to do is either change the goal to an outcome, I can completely control or attach it to an action that I can control. So instead of saying I want to reach 100,000 YouTube subscribers, I would say, Okay, what do those accounts have in common, so like, work backwards?

Well, they upload consistently, they have a certain kind of editing style, or they're being really in touch with their audience, and they're showing up consistently for that audience and growing and nurturing that trust. So maybe that goal needs to be I'm going to publish weekly YouTube videos with the hope of 100,000 subscribers, but the metric I can completely control is how many videos I'm uploading, right? So that's something I've done to completely flip my goals and make sure that I don't have just a big list of things that I can't actually control. I can't force someone to sign up for my email list. But I can create two new freebies or one new incredible training that's free that you have to exchange an email address for, right. So really try to make sure that you're setting goals that you can control and that you know, what actions might lead you towards that goal.

Another thing that's helpful is to connect your goals to your life vision. So I kind of alluded to this earlier, I think sometimes when we set goals, we can set like a lot of should goals, like based on like what we think we should be doing or what someone else might be doing. And sometimes those are great goals, like they're good. But if reading 20 books, you know, is something that like your best friend said that she was going to do this year. And now you feel compelled to read 20 books too, and it's not so much you're inspired to you almost feel that you have to or that that's what good business owners do, reevaluate that make sure that the goals that you're setting truly connect to the vision that you have for your life, the values that you have for your life and the direction that you're going and that these things support

that and haven't been borrowed from a friend or connected to someone else's goals, or just someone that you really admire, has said they want to achieve something and then you decided you wanted to do it as well.

Okay, the next thing is to record all of your goals somewhere that you can actually review them frequently. This is something I started doing, I would say in the past like year or two, I've gotten a lot more consistent about reviewing my goals that I set in January, or that I set in December of the previous year, throughout that year that I'm in and really making sure that I didn't kind of write it down, tuck it into a journal, put it in a drawer and then move on with my life, make sure that your goals are somewhere that you're going to see them pretty frequently, I would encourage you to look at your goals, absolutely every quarter when you're planning for the quarter, but more so it would be the most beneficial to see them on like a weekly or monthly basis and make sure that you can check in and say okay, are we doing things in the business and in life and for myself that align with those goals.

The last thing that I think is really, really helpful is to share your goals with a friend or two. If you have a coach, if you have a mentor, I think this is a fantastic person to share your goals with I think you can also do this with friends or like a peer mentor, situation like maybe you've created your own mentor mastermind with a couple of friends. This is the perfect place to share some of those goals and be held accountable to those goals. I want to share one of the metrics or like the criteria for goal setting that Michael Hyatt shares in his book your best year ever. He uses the acronym smarter, and he says that your goals must be these seven things.

Specific, Measurable, Actionable, risky, time keyed, and exciting and relevant. And you can read about this, I'm actually just going to link to his blog post here in the show notes that shares, like detailed explanations of what each of these words means broken down as a goal. So if you are really into that kind of thing, I'm gonna have some resources down in the show notes. But I think this is really, really helpful. And I also really recommend that book your best year ever have it on Audible. And actually listen to this every year. It's really, really good, very inspirational and just such an easy lesson. So you're at the end of your planning day or your planning weekend, you have done so much work, so much deep work, reflection, celebration, but also planning your goals. And let's say that you have done all this work and you have goals written down, you have a vision and a plan of where you're going, your next step is going to be to actually start to calendar some of these goals, I like to look at quarterly calendars and have a loose structure of when I plan on doing launches, when I have booked dates and times for the year. And when I'm going to go on vacation, things like that. So this is a time where I'm going to actually start, I guess I would say pen to paper, but it's really like sticky note to calendar because I want to be able to move them. This is a time when you actually start to put things on your calendar. So if you are digital calendar person use that. I really like having like printable calendars. And I have a link for you guys for yearly and quarterly calendars by Ashley profit. I love her. She's a designer, and she creates calendars.

And she has an Etsy shop with downloads for these calendars. So you can actually get them printed really cheaply on like huge paper at like Office Depot. And I like to print multiple copies that way, like if they get messed up, or if I want to restart one, it costs like \$1 to print. And it's just really nice to be able to have even a calendar that's going to be for your content or calendar that's going to be for your client work and things like that. So whatever works for you, at this point, grab all of the sticky notes and all the highlighters and get messy with the calendar really start to play around with what can you do to implement everything that you just did all that work that you just did, and actually start to, you know, put

it down into paper so that you can see, okay, how are these new goals going to influence my content? How are these new found data points and vision for my business? How is this going to actually connect to the launches that I'm going to have or the team that I'm going to grow or things like that. So this is a great time to connect it with your calendar.

All right, a few final wrap up activities, I would say the first is to communicate this vision, the goals that you've created in this planning time with your team, this would be at least a video call so that you can communicate where your company is going. I like to even have calls like this, if it's a contractor, or if it's somebody who helps me edit videos or YouTube content so that I can explain to them where I want to take my business and what the goals are for my YouTube channel or what my goals are for my blog or my podcast. And in doing so I really think it helps them do better work for you. Because they understand what are the metrics you even care about? What are the goals in your business, and so on and so forth. So communicate all of what you've done into a call a loom video or an email at the very, very least. Next, write those goals down somewhere that you're going to see them every day. I know I said this before, but really think about this. What are you using in your business to track projects and clients? And where are you actually going to see these things.

So know yourself know that you need to put reminders in your calendar to review these goals know that maybe you don't look at those calendar reminders. And you really need something totally different in terms of accountability, and seeing these goals on a daily basis. The next thing you need to do is to add a date right now for your quarterly planning so that you have a reminder to do some quarterly planning. I know that at the end of the year, when we have this calendar moment where we get to see a whole new year in front of us. It's kind of instinct to plan. But it might not be your instinct to quarterly plan or to monthly plan. So this is a great time to set yourself a reminder to set aside the time and to get into the habit of doing this kind of planning on a regular basis. The next thing you need to do and the very last thing I have for you is to find and gather accountability around yourself and around these new goals. I think you should be selective about who you share your goals with because not everybody is in a place to hear your awesome amazing ambitious goals and they're not going to be able to support you in them the way that you need.

So you know The people in your life that are cheering you on that want to see you win, and that are going to check in with you and make sure that you're still pursuing those goals. So share those goals with those people, and maybe not with everybody else. I think we need the motivation of telling other people, because our own excitement over these goals is going to wane, right? Like we have so much energy and excitement around our business, during times of success. And during times where you know, the bank account looks really awesome. And then other times, especially, you know, you're a few months into the year, you've hit some setbacks, you've had some hardships, normal things start happening. And it can be really, really easy to like, lose the focus that we had January one of 2023. And having those people around you the accountability and those check ins is going to be so important to getting you to the finish line on those goals. I think a fantastic place to find like minded business owners and accountability can be Facebook communities. I know the call to both Facebook community for this podcast is a fantastic place where a lot of women are hanging out having conversations and talking about where they're headed in their business.

And it might be a fantastic place for you to get connected and dive a little bit deeper with your business besties. So I'm going to leave a link for the call to both community as well. If you're not already a member, go ahead and join. And we'll see you over there. This has been so fun. Thank you for joining

me for this planning and goal setting series. I have just loved sharing a small piece of how I go into a new year and how I plan in my business. And I would just love to hear what your goals might be for this year. So if you want to send me a message on Instagram, I would seriously love to hear from you. I'm at join Michelle on Instagram, and I will see you over there. 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 episode right now and sharing it on your social media. I would also appreciate it if you would subscribe and leave me a five star review. Thanks again and I'll see you in the next episode.