BUSINESS
PLANNER

Your business .....

Your name .....

This Planner starts on .....

essentialiving



This is your life.

You can decide for yourself what you do with it.

You can do anything, but not everything.

So focus on what is essential for you, and ban everything

from your life that is holding you back from living

the way you want to:

possessions, activities, relationships, eating habits

or thoughts. Don’t let yourself be guided by convention,

or by what other people expect of you. Stand still for a

moment and then go after what is important to you.

Make a conscious choice, every time.

Live a life true to yourself. Live an essential life.

essentialiving

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Scheduling the Essentialiving way

The biggest misconception about planning, in my opinion, is that you create a schedule to get as much done as possible. To fit everything together cleverly and efficiently, so you can work through your appointments, tasks, and activities like a robot. NO. A good plan, whether for your business or your life, should be a tool to help you gain an overview and make informed choices. It should provide peace of mind and allow you to see if everything you want is achievable within the time frame you have available. It shouldn't be about doing as much as possible, but about doing the right things.

Change your starting point
The fundamental difference between an Essentialiving approach to planning and other approaches is the starting point. Most people take everything they 'must' or want to do as a starting point and then try to fit it all into their day. Instead, with the Essentialiving approach, you start with the number of hours you have available. Subsequently, you decide how to allocate that time. This Planner enables you to do just that.

The Essentialiving approach forces you to make choices, to weigh up what is most important or valuable for you to do and what simply won't fit into your day. As a result, you'll never run out of time, ask too much of yourself or feel overwhelmed. It will help you become aware of the meaningful realisation that you can do anything, but not everything.

The benefits of a quarterly structure
The world is changing rapidly, and business owners need to adapt at a faster pace. That's why this Planner has been set up in 3-month sprints.

You can start your first 3-month sprint whenever you like: just choose whichever month of the year works for you. You will find schedules in this Planner for two 3-month sprints.
Since I do recognise the importance of holding on to a course you have set out and not changing direction all the time, all the schedules and plans you make derive from the vision you have defined. So every quarter, you reevaluate how to get closer to that vision instead of planning the whole year in advance. In my experience, this has proven to be the best way to reach my own goals. And that's exactly what I want for you too.

A word of comfort
If you have difficulty sticking to the plans you made, don't be too hard on yourself. This Planner is very much intended to help and support you, not to bully you or make you feel worthless. You can always pick yourself up, dust yourself off, and try again.

- If you find that, even though this Planner helps you to make choices, you still assigned yourself too many activities, or that you expect yourself to do more in the time you have available than reality allows, adjust your planning. It's not weak; it's good thinking! Learn from it, and next time, make better plans that are actually achievable.
- If you have difficulty holding on to your plans, go back to the vision you created in this Planner and remember why you are doing this in the first place. Visualise the end result, and feel the pride and joy of each moment when you accomplished what you set out to do. That will motivate you to keep going.
- If you don't see any results of your hard work yet, and you feel like giving up: don't! I know that this is the hardest part of all. Although on a daily basis it may seem like you're not making progress, when you look back after a longer period of time, you will suddenly see the big strides you have taken. So keep going! And do NOT compare yourself to others. Believe in yourself and in your own path.

Now it's time to focus on what matters. This Planner is your guide. Just follow the course set out for you in this Planner, and you'll be on the road to success.

THE ART OF SCHEDULING

This section clarifies how to use all the schedules outlined in this Business Planner.

Setting Monthly Milestones

At the start of each month, it's crucial to refresh your memory regarding Your Vision and the goals you set for this quarter. With these in mind, you can now break down the planned outcomes into smaller, manageable parts: milestones.

The purpose of setting Monthly Milestones is to provide direction. By breaking down achievements into smaller bits, you can maintain an oversight of your progress and avoid overwhelm. Moreover, if you're uncertain about the path that will lead to the ultimate result, this approach helps you focus on the initial steps and keeps you moving forward.

Typically, every quarterly result can be divided into 3-4 Monthly Milestones that are essential for reaching your overall objective for the quarter. Milestones serve as major phases, and progressively guide you toward the desired outcome. Please note that you don't have to tackle every quarterly result you defined in a single month. Instead, consider what is attainable.

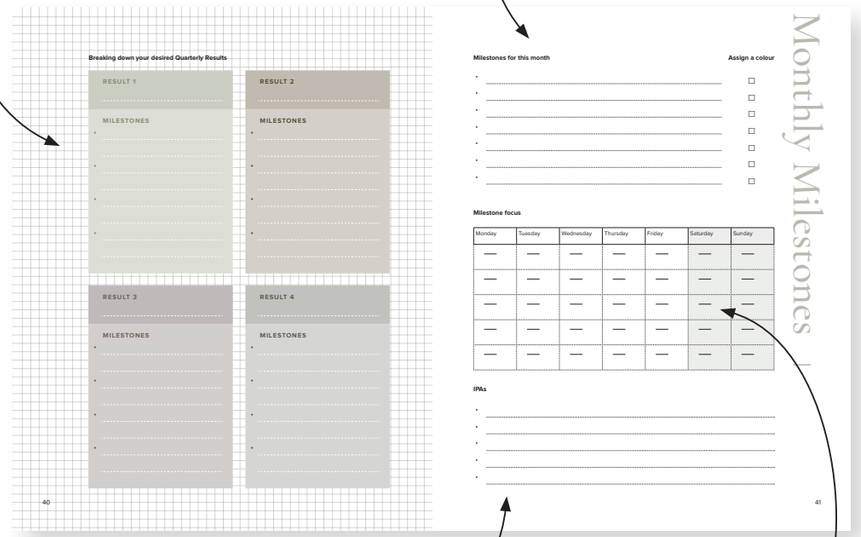
Once you have listed the milestones for each quarterly result you want to work on this month, it is important to also determine which of those milestones are realistically attainable within the current month.

To sharpen your focus even more, the Monthly Milestones schedule offers a monthly overview that enables you to colour the specific days or weeks dedicated to a (non-daily) milestone, giving you a visual representation of your monthly plan.

Lastly, define the IPAs for this month, taking into account your milestones and your overall objectives. Remember, IPAs are the daily actions you want to incorporate into your routine that contribute directly to your revenue. That is not to say that milestones don't contribute to your revenue. What differentiates an IPA from a milestone is that an IPA is part of your routine. It's a daily commitment, an activity that you undertake consistently, as it represents the minimum effort you dedicate to your business on a daily basis.

Break down the Quarterly Results you want to work on this month, into milestones

Determine which of those milestones you are going to work on this month and assign them a colour



➜ *Turn to page 40-45 & 50-55*

Define your IPAs for this month based on the milestones and your overall objectives

Fill in the dates of this month and colour cells to indicate the milestones you will focus on and their corresponding timeframes, to provide a visual representation of your monthly plan

Access a complimentary sample showcasing fully completed schedules.

Reflection on the previous quarter

What are your biggest achievements and which activities led to these successes?

What didn't work so well and what lessons did you learn from this?

Area of Business

Grade each area at the beginning of this quarter:



Product



Marketing



Sales

☐ ☐ ☐

Based on these grades, your **key focus** will be the business area of (tick the box):

Quarterly Results

Results you want to achieve this quarter

RESULT 1

WHY?

RESULT 2

WHY?

RESULT 3

WHY?

RESULT 4

WHY?

Breaking down your desired Quarterly Results

RESULT 1

MILESTONES

-
-
-
-

RESULT 2

MILESTONES

-
-
-
-

RESULT 3

MILESTONES

-
-
-
-

RESULT 4

MILESTONES

-
-
-
-

Monthly Milestones

Milestones for this month

Assign a colour

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

Milestone focus

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—

IPAs

-
-
-
-
-

Weekly Game Plan _____

Monday _____

Hours available _____

IPAs

☐ _____

☐ _____

Actions

☐ _____

☐ _____

☐ _____

Meetings | When

_____ | _____

_____ | _____

_____ | _____

To do

☐ _____

☐ _____

☐ _____

Tuesday _____

Hours available _____

IPAs

☐ _____

☐ _____

Actions

☐ _____

☐ _____

☐ _____

Meetings | When

_____ | _____

_____ | _____

_____ | _____

To do

☐ _____

☐ _____

☐ _____

Wednesday _____

Hours available _____

IPAs

☐ _____

☐ _____

Actions

☐ _____

☐ _____

☐ _____

Meetings | When

_____ | _____

_____ | _____

_____ | _____

To do

☐ _____

☐ _____

☐ _____

Thursday _____

Hours available _____

IPAs

☐ _____

☐ _____

Actions

☐ _____

☐ _____

☐ _____

Meetings | When

_____ | _____

_____ | _____

_____ | _____

To do

☐ _____

☐ _____

☐ _____

Friday _____

Hours available _____

IPAs

☐ _____

☐ _____

Actions

☐ _____

☐ _____

☐ _____

Meetings | When

_____ | _____

_____ | _____

_____ | _____

To do

☐ _____

☐ _____

☐ _____

Saturday _____

_____

_____

_____

_____

_____

_____

_____

_____

Sunday _____

_____

_____

_____

_____

_____

_____

The fewer
the tasks,
the greater
the impact

ANONYMOUS





ESSENTIAL ADDITIONS

Utilise these additional schedules to optimise your performance and successfully accomplish the objectives you've set for yourself.

Content Idea Vault

What	Used	Channel
	☐	
	☐	
	☐

What

Goal

Metrics Monitor

Don't
follow
the crowd;
let the crowd
follow
you

MARGARET THATCHER

Time Blocker

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
05	05	05	05	05	05	05
06	06	06	06	06	06	06
07	07	07	07	07	07	07
08	08	08	08	08	08	08
09	09	09	09	09	09	09
10	10	10	10	10	10	10
11	11	11	11	11	11	11
12	12	12	12	12	12	12
13	13	13	13	13	13	13
14	14	14	14	14	14	14
15	15	15	15	15	15	15
16	16	16	16	16	16	16
17	17	17	17	17	17	17
18	18	18	18	18	18	18
19	19	19	19	19	19	19
20	20	20	20	20	20	20

Key

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

Notes