

Annual “Planning” Day

WORKBOOK

Finding Clear Guidance for the
Journey of the New Year

The Annual “Planning” Day

I don't believe that as individual human beings we have complete control over the universe, or that intention alone guarantees a positive outcome.

I see a universe that is messier, and more surprising, and more capricious than we might like. A world where our intentions and desires guide us without guaranteeing any particular outcome (no matter what someone is promising you in their marketing copy).

Where we may get what we need, but not what we want.

Where we are constantly challenged to see ourselves and our place in the world more clearly. Where we have constant opportunities to show more courage, to grow more quickly, to align more fully with what we know is true.

So what we do this time of year matters.

At its best, we use this closing of the year to see ourselves with new eyes, and to meet ourselves with love and compassion and curiosity in the face of all that did or didn't transpire. To feel anything but indifferent as we track ourselves and our journey around the sun this year. To grow wiser and more humble as we consider everything we didn't know a year ago, everything we believed or bought into that wasn't true, and every solid new insight we gained as a result.

With THAT clarity, how we move into the New Year changes dramatically.

Instead of being jacked up on fantasies of how we are going to be SO MUCH BETTER than before, we have this deep grounding and compassion and understanding of who we are and what we bring to the table. This brings a naturalness to what we decide to do next, a simplicity, an “oh, of course” quality that makes us more sure-footed, more potent when we do show up.

With this clarity, we start to trust that we, and the world, will benefit from our showing up more fully. We recognize that in the ongoing discovery of who we are as a soul we find the juice we need to bring more of ourselves forward.

We allow ourselves to want more, and to be more clear-eyed and determined about how we go about getting it.

We find a freedom to move forward in a way that creates meaningful change, whether or not it's the change we were shooting for.

So to create a space where you can clear out the deadwood and see yourself and your desires more clearly, I offer the Annual “Planning” Day. Four hours and a bit to take a deep dive into what you most desire, and to explore how to turn those desires into new direction.

Today is designed to take you through a powerful set of exercises and questions to help you make important discoveries about who you are and how you want to move forward this year.

The goal is NOT to leave you with a neat and tidy plan, spelling out exactly what you will do when to achieve certain outcomes.

Rather, the goal is to make a bit of a mess. To dig around, to open things up, to stimulate new thinking. To bring new life, new energy, and greater clarity and insight into the stage of your journey called 2018.

I encourage you before you begin the Annual “Planning” Day to do an Inventory of the current year. (See Year-end Inventory for instructions.)

During our “Planning” Day, we’ll go through four stages:

- Digesting the Current Year
- Dreaming and Desiring
- Choosing and Adding Form
- Healing What Needs Healing so We Can Move Forward with Deeper Love

Seeing Things with New Eyes

The day is designed to give you a dose of what I call Catalytic Recognition. To give you questions and exercises intended to sink you more deeply into yourself and jolt you with new clarity about who you are, what you are here to do, and where it makes most sense to focus your energy and efforts this coming year.

So you feel at peace about the year that was. Grateful for it in all its lumpy, bumpy, warts-and-all glory.

And so you feel fierce and focused about what comes next. Clear on what nourishes you. Clear on what matters most. Clear what you’ll devote your love and energy to and clear what you’ll leave behind.

Not because you are a magician who can easily predict the future. Or someone waving a magic wand. Or Captain Picard saying “make it so.”

But because you love yourself and you want more for yourself, and you are ready to stand up and face the hard and welcome the good for another year well lived.

The day is also designed to give you new, more compassionate perspectives on being human, wanting things, and building a business.

My hope is that you’ll leave today with a new clarity, and with an inner momentum to make this next year as rich and powerful and beautiful as you can.

Meeting Ourselves in Our Desires

The New Year can be a tricky time.

It’s a time where we have to stand and face our own yearnings and desires. To choose to either reach for them with all the tenderness and confusion in our hearts or back off and scale down to protect ourselves from disappointment.

It’s a time where it’s tempting to challenge ourselves to try once more to do everything we’ve failed to pull off before.

It’s a time we can feel muddled and jumbled and unsure of how we want to move forward.

I think if there is one thing we are really being asked to do this time of year, it’s to come back to clarity about what we really want.

It’s a time that we are challenged to separate the true desires from the shadow desires.

To make room for the parts of yourself that scream to be rich, and powerful, and popular, and universally loved. The parts that tell you you need to lose 20 pounds, to save more money, to eat fewer brownies and watch less TV.

And it’s also a time to question if that’s really true.

To challenge your own assumptions that if you make more money you’ll feel more peaceful, or if you find a partner, you’ll feel less desperately lonely, or if you grow your business, you’ll feel more worthwhile.

And, it might be a time to admit simply that you want to be peaceful, to feel connected, and to know your own value. And to be uncertain, and un-expert about what might create that for you.

What troubles me about some year-end/New Year’s planning approaches is that they don’t make room for all these complexities.

They don’t help you distinguish between the younger, wounded, and confused parts of yourself, and the stronger, clearer truer parts. They encourage boldness, and bigness, and ambition, (all fine things in and of themselves) at the expense of the quieter stories, the more subtle callings.

They can pat you on the back for reaching for bigger and better things without acknowledging the difficulties of navigating between your present reality and the vision you are chasing.

To put it bluntly, our rational minds don’t always know what we really need.

If we stay with the desires on the surface, we may miss the real things we want: the sweetness of being more fully ourselves, the comfort of discovering we already are most of what we want to be, the curiosity of trying something new to see what will happen.

That’s why I like to start the New Year by bypassing my rational mind.

When we take more time and thought designing the New Year, instead of leaping into a list of ambitious goals, something changes. Instead of being jacked up on fantasies of how we are going to be SO MUCH BETTER than before, we have this deep grounding and compassion and understanding of who we are and what we bring to the table. This brings a naturalness to what we decide to do next, a simplicity, an “oh, of course” quality that makes us more sure-footed, more potent when we do show up.

Healing What Wants Healing

I believe ultimately our best path forward comes from healing the hurting parts of ourselves.

Using what we want, and the possibility that we won’t get it, to find and name the parts of ourselves that are lost, confused, and frightened.

To see more clearly the old sad stories we tell ourselves about who we are and what is possible for us.

To bring to light the false stories, the assumptions, the judgements, and the beliefs we have about who we are and what life is requiring for us to get what we want.

Session One: Digesting the Past Year

Experiential Digestion

Experiential Digestion is the act of tasting, savoring, and absorbing the full dimensions of the experiences you’ve already had.

I believe that when we take in and absorb what HAS already happened to us, we find most of the insights and clarity we need to move forward more effectively.

When we rush ahead without taking the time to digest, we risk having similar experiences over and over. We place less value on who we are and what we’ve done because we haven’t taken in the meaning, the value, or the learning of what we’ve lived.

Digestion lets us harvest the nourishment from what we’ve lived. Digestion reminds us that we are never starting from scratch, that we have genuinely good and important things in our history to build on. Digestion helps us see what we are already doing that is working, and the elements of our lives we want to extend and continue into the New Year.

To fully digest an experience, we need to:

Gather Accurate Data

Remind yourself what did or did not happen this past year. (I recommend you do a Year-end Inventory of the past year BEFORE our Annual Planning Day. See our Year-end Inventory Worksheet for full instructions.)

Tell the Truth

Name what feels true about what did or did not happen. No spinning. No positive reframing. No minimizing. For example:

- I got some new business.
- I had some odd interactions with clients.
- My revenues dropped by 10%.
- I let go of two friendships.

Name the Feelings

Sometimes in personal growth circles, we are encouraged to always be positive about what happened. Not useful, in my opinion.

Allow yourself a full range of feelings about what did or did not happen this year. This includes grief, rage, sadness, shame, anger, anguish.

Name these feelings. Put your hand on your chest and your belly. Breathe in the feeling. Say out loud, if you can "I feel ____". Release it with your breath. (You can also add the Buddhist practice of Tonglen - breathing out a blessing to everyone who is having that feeling in this moment.)

Meet Yourself with Fierce Self-Love

Extend love and gratitude to yourself for what you did or did not do. Extend love to yourself for being a brave human who took brave steps, regardless of outcomes. Hold yourself with the grace that you want the world to hold you with.

Acknowledge Yourself

Name progress made. Do not be stingy naming or noticing progress. Notice if you want to dismiss the progress you made as insufficient or inadequate.

Take a Moment for Gratitude

Make a written or spoken list of everything you are grateful for this year.

Harvest the Learning

Once you've done your Year-end Inventory, it's time to really chew on the information that came to light. Here are some Life questions that may be useful:

- What did I learn this year?
- In what areas did I shift the most?
- What made me happiest this year?
- What did I let go of this year?
- What was challenging but also a blessing in disguise?
- What just full out sucked?
- What can I most give myself credit for?
- What nurtured me the most this year?
- What surprised me? What could I have not predicted?
- What spells, illusions or false stories am I operating under that are keeping me from experiencing the fullness and richness of life and work I desire?
- What unhelpful patterns of behavior am I ready to let go of to achieve something materially different this year?
- In what areas do I need to have more compassion for myself and less judgment?
- In what areas can I let go, and not try to improve, so I can concentrate on those areas where I do want to shift?
- What resources and assets do I have available that I am not using, or not using to their fullest?
- What was the Story of my 2017? (*This is my favorite question and the one I would focus on if your time is limited.*)

Here are some business questions you might answer:

- What is working well in my business?
- Where do I experience the most joy and grace in my business?
- What evidence am I seeing that I am on the right path or doing the right work?
- What changes most contributed to my growth this year?
- Where in my business is there more growth and potential?
- Where am I spending money in a way that does not bring joy?
- What, if any, part of my business am I ready to let go of?

Ceremonially Close the Year

This can be as simple as saying out loud “I now declare this past year complete.” (Ok, I realize it’s not actually the end of the year just yet, so you can either energetically declare it complete, or mark time off the last few days of the year to do this.)

Or “I honor all that passed this last year and ask it to bless me moving forward this coming year.”

Session Two: Dreaming and Desiring

Ok, this is the fun part!

Essence vs. Form

As you go through the exploration in the next few sessions, I want to invite you to make a critical, but undervalued, distinction between Essence and Form. Essence is what is fundamentally true—true about us, who we are, what we bring to the table. Essence is the stuff that can’t be changed even if we wanted to. Form is the vehicle through which Essence comes forward. Form is our best guess about how we’ll bring that Essence into something concrete. As humans, we aren’t always good at predicting what will make us happy, or choosing the best Form to express our Essence in the world.

When we don’t see the difference between Essence and Form, we cling tightly to our plans and goals, we worry about measuring up, and we suffer if the Form we chose fails to deliver on its promise. But if we are clear what is Essence and what is Form, we have a lot more fluidity. We know our first job is to honor what matters most, and in doing so, we become more flexible about Form—more willing for it to change, shift, adapt as we go along. We hold our success or failure more lightly. We are more nimble on our feet.

Traditional goal setting focuses on Form and leaves out Essence. That’s why it can be frustrating and disappointing. Or feel empty and unsatisfying. That’s why I want to show you a way to dial in to the Essence of what you want this coming year, before you start to play with Form.

Before Goals or Intentions: Calling in the Right Qualities

We often think that we know what we want, and yet our wants come and go. They operate on different levels—I want a cookie, I want a nap, I want to make a difference, I want world peace. Zeroing in on what we want isn’t a trivial task, so we’ll spend the better part of the next two hours clarifying what we want.

I truly believe that our success depends less on how we exert our will and impose ourselves on the world, and more on our ability to tune in to what is ours to claim. We can’t usually do this with our more rational mind, which is scurrying around with a big list of all the things we could or should do.

Rather than leap straight to goals, or even visions, we are going to begin by sensing our way into the energies that our bodies and spirits are already beginning to align with.

What I Want For You

I don't want you to have a thriving business.

What I want is for you to have a thriving life. A beautiful, rich, meaningful life. A life that might well include work that gives you a sense of purpose and contribution. A life that might well include work that generates income that allows you to live generously.

So in setting your themes, your projects (and yes, maybe goals), and your plans for the New Year, I encourage you to remember that for yourself.

I beg you, do not create a plan for growing your business that demands you sacrifice your life.

Your work is here to support you, and the expression of who you are in the world. Not the other way around. A business that devours you is not a business I want to help you grow.

I want to help you grow the business that allows you to fully experience all the qualities of life that you desire: joy, play, exuberance, depth, richness, growth, expansion. And you won't do that following a blueprint or success formula. Or working yourself to the bone.

Soul Discovery

In this precious, beautiful, sometimes painful life journey, we anchor ourselves in the clear-eyed recognition of who we are as souls. In the ongoing discovery of what is real and true, beyond the surface and beyond the noise of the world, we tap into a source of energy and excitement that helps us navigate and supports us in taking courageous steps to be seen, heard, and known in this lifetime.

There are many processes and tools we can use to know who we are and to divine how we want to express in this lifetime: Your Life Purpose (according to Scientific Hand Analysis or other systems), the True Spirit of Your Work, or your Human Design. We can spend a lifetime gathering pieces of the mosaic that defines who we are and who we came here to be.

Today, we are going to use a non-logical, right-brain exercise to help us make a “soul discovery” that can help guide us in the coming year.

Please do not do the following exercise in advance of our “Planning” Day. There is a magic to doing this with the group.

1. Word Association

NOTE: We will do this together on our second session. It works best if you DON'T prepare your answers in advance. That said, I have this here so you can review after our second session or if you are going through this at another time.

Without thinking about it too much, put down the first thing you think of for each question:

If 2018 were a _____, what would it be? (e.g. – "If 2018 were a color, what color would it be?") Use your answer to fill in the first two columns of following chart.

If 2018 were a:	Your Answer	Quality	Quality	Quality
Color				
Flavor				
Scent				
Texture				
Location				
Piece of Music				

Examples:

- Color: lemon yellow
- Flavor: peppermint
- Scent: hot chocolate
- Texture: corduroy
- Location: public library
- Music: Brandenburg Concerto

2. Qualities

Now, go through each answer and write down three qualities you associate with each of your answers. There is no right answer, just feel your way into what each thing you chose means to you. These will be adjectives. Don't worry if they make any logical sense.

Example:

- Color: lemon yellow – bright, cheerful, optimistic
- Flavor: peppermint – alive, bracing, tart
- Scent: hot chocolate – comforting, cozy, rich
- Texture: corduroy – solid, strong, comforting
- Location: public library – ordered, strong, light
- Music: Brandenburg Concerto – ordered, lively, soothing

3. Clusters of Qualities

What's neat is that you'll see themes and threads emerging as you look at the qualities you wrote down. In some sense, you'll see a message from yourself to yourself about what wants to be created.

Now, cluster the qualities that seem to go together.

Working with the example above, I would see the following trends:

- Comforting/cozy/soothing/rich
- Solid/strong/ordered
- Bright/cheerful/optimistic/light
- Alive/bracing/tart

Notice, in this case, that there is a strong repetition of “comforting”, “strong,” and “ordered.”

These are the Qualities that are calling you. How can you follow that call? Create more of these qualities in your life this year?

4. Inside Out: What Do I Imagine Would Deepen My Experience of These Qualities?

Where Do I Imagine

Looking over your Clusters of Qualities, ask yourself “Where in my life do I imagine I will feel (quality here)?”

So, for example, “Where in my life do I imagine I will feel comforting/cozy/soothing/rich?”

Go through each Cluster and see what answers emerge.

How Can I Deepen?

Putting aside for a moment what you “think” you should do this year, imagine your life and work is a blank slate. If nothing were on the table but the desire to experience more of the qualities you named, where would that lead you? What would you do differently?

Take each cluster, one at a time, and ask yourself, “what do I imagine would deepen my experience of this quality this year?”

So, for example, “What do I imagine would allow me to have a more comforting/cozy/soothing/ rich year this year?”

Sink into that feeling, that sensation. Move your body, put on some music, smell a scent. When you feel connected to those qualities, make a list of everything that floats up for you, be it business or personal, tangible or intangible:

- More down time
- More body work
- Buying a chenille throw for my sofa
- Less drama or ups and downs with income and cash flow
- Deeper, stronger connections to my clients

Continue with each cluster. For example:

- What would make this year feel more solid, strong, and ordered?
- What would make this year feel more bright, cheerful, optimistic, and light?
- What would make this year feel more alive, bracing, and tart?

You can also ask the question about specific arenas of your life, particularly the ones where you struggle:

- How could I bring more comfort to my marketing and enrollment this year?
- How would I make my home more bright, cheerful, optimistic, and light?
- What would make my relationships more alive, bracing, and tart?

Notice if anything rises up as a should, or with a sense of heaviness.

You don’t need to commit to implementing any of these ideas just yet. Allow yourself to sink more and more into the feeling you want to create this year.

Some folks find this question difficult. That’s OK. As Barbara Kingsolver says to her kids, “you can do hard things.” Allow yourself to sit with the discomfort. Notice if anything rises up. And if not, don’t worry, we have lots of other questions to play with.

5. Sacred Yearning

Sacred Yearning is the act of acknowledging and naming your hunger to do, be, feel, and express more in this lifetime. Sometimes it’s hard to allow ourselves to move into this wanting place. We may want to protect ourselves from disappointment. Or, we may have been shamed or judged for wanting what we want. Part of the powerful energy we open up this time of year is the energy of desire. Ideally, we open up a soft space in our center where we allow ourselves to open more deeply to love, to devotion, and to the unique footprint of what we yearn for.

Now that you’ve immersed yourself in your Qualities, ask yourself: “What do I most deeply want for myself as a human being? What do I long to feel and experience?”

Your list could include:

- Knowing and experiencing a deep exchange of love with another human
- Full expression of my creative visions and impulses
- Deep peace and acceptance of who I am

Make a list. You aren’t limited to one thing.

Now ask yourself: “What do I most deeply want for myself in my business? What do I long to feel and experience in and through my work?” Our work can be a powerful vehicle for experiencing meaning and fulfillment.

Your list might include:

- To be fully occupied sharing my special magic with the world
- To generate a lush income that lets me travel, play, and live in beauty
- To have loving, peaceful, devoted relationships with my clients

Asking this way takes us beyond the limits of goals. It takes us to the whole point of goals. What is it you believe achieving those goals will create for you?

6. If You Are Naturally Goal-Oriented

While I am personally no longer big on goals, there are times that setting goals is lovely and appropriate. These times include:

- You love setting goals and it works for you to set goals (no getting stuck in shame or frustration)
- You have a specific desire that you see so clearly, or an outcome you want so dearly, that to not set it as a goal would be dishonoring
- You are at a stage of development in your business where hitting certain milestones is critical and may determine the future of your business
- You aren’t getting clear or inspired by our more indirect questions.

If you aren’t drawn to setting goals, you can skip this section. But if goals are hovering around you, here’s how I suggest you work with them.

Write down the goals, milestones, or outcomes you are yearning to create this year, whether or not you think they are “good” goals.

These might look like:

- Building a full practice
- Getting booked as a speaker at a TEDx talk
- Losing weight
- Finishing a writing project
- Earning a certain accolade

Now, for each one, ask WHY this goal or outcome feels important:

- What do I believe achieving this will allow me to feel and experience?
- How ELSE can I experience those qualities beyond reaching this milestone?
- How will achieving this goal help me experience more of the qualities I’ve said I want to experience this year?
- How can I pursue this outcome in a way that deepens my experience of the qualities I’ve said I want to experience?

So, for example, you might say your goal is:

- **Build a full practice** (of course you want to define exactly what full is)
 You might answer this way: *Building a full practice would make me feel like my business is REAL! If I had a full practice, I would feel like I was making a bigger difference, having more impact, fulfilling my purpose. Plus, the income I would earn means I could live more comfortably, and keep pursuing this work!*
How else could I make a difference? I could give life-changing talks. I could interact on social media in a way that touches and moves people. I could be more politically active.
Having a full practice will give me comfort and security so I can spend less time worrying about paying the bills and more time having an impact on others.
I can’t pursue my full practice the crazy, stressful way I’ve been doing it. I need to find calm, sustainable ways of going out in the world so I am not exhausting myself, or marketing from a place that feels desperate. I need to rethink my strategy.
- **Getting booked as a speaker at a TEDx talk**
Speaking at a TEDx conference would challenge me to bring my concepts and ideas together in a powerful way. It would require me to step up and grow into ownership of my expertise. It would introduce me to a larger audience and give me video I could use to continue to grow my audience.

Ok, a TEDx talk would be cool, but you know there are probably other places I could speak and have impact. What are those?

This ties in with the theme of alive, bracing, tart. Moving into territory that is new and exciting and scary.

How do I pursue these higher profile speaking engagements in a way that is comforting, solid, bright, and alive? Ok, so no shaming myself. I want to prepare a talk that feels really aligned, that I am excited about, and let that excitement drive me instead of trying to shape myself into what I think people want.

By diving more deeply into the desire behind the goals, you'll see yourself and what you want more clearly. If you do decide this is an aligned and meaningful goal for you, by all means set it as a goal, but I encourage you to hold the goal lightly. You may see that some of the things you think you want aren't really what you want, it's just one way to have the deeper thing you want. Or you may see that the way you were planning to pursue that goal is in conflict with what you say you want. **Knowing that the path to what we most desire doesn't always look the way we think it will.**

Rooting out any inconsistencies NOW will make your path this year a lot smoother.

7. The Magic Wand

Now, there is a flip side to the illusion that achieving a certain goal will magically make everything in our lives better (when we make this much money, when we lose weight, when we find our partner).

And that's not daring to reach for what we want because we've been disappointed in the past.

Sometimes our reach atrophies.

We stop letting ourselves want something because we've struggled so long to get it.

There is a place in this process to allow ourselves to dream big. To lower our defences and allow ourselves to dream.

Now that we've anchored in some deeper truths (our Qualities, our Sacred Yearning), it's a good time to cast a wider net.

If you had a magic wand, and could easily change your life in any way you chose, what would you choose?

If you knew you would be given the skills, abilities, resources, and support to make anything you wanted happen, what would you want to see happen? What would you want to see change in your life?

What you're feeling for here is whether there is any place you've fallen in to an old, sad story about what is and is not possible for you. Any place you are cutting yourself off from reaching for something that you truly want.

You don't have to take anything you write here on as a goal. But by answering this question, you expand the reach of your desire.

8. The Story of the New Year

What do you sense might be the Story of your New Year?

Take some time to write it as a narrative (meaning some semblance of complete sentences and paragraphs that connect to each other. I find that longer phrases expand you more than bullets.)

I begin mine with this statement: “I envision 2017 being about . . .”

Here’s a sample of some of what I wrote for 2015, I think:

Letting go of what no longer serves. *Purer expression of my voice. FB posts, ezine articles, offerings, teachings. I see myself sinking more into my expression, challenging myself to be more vocal and visible.*

Memoir. *Greater integration of my creative writing with my professional work. I want to continue to stretch myself as a writer and to move this project forward, and I want to bring all the things I work on as a memoir writer to my professional writing. I want to share more stories, bring the depth and tenderness to what I share about personal work to my professional work.*

Greater comfort in my own skin. *Greater trust, greater knowing that I work with the universe. Less angst about “What will happen? Will I be disappointed?” To keep cycling back to ways to feel calmer, more loving, more accepting of myself.*

What I like about this approach is that it goes beyond the question “What do I want?” and it starts to move us towards “What do I sense is the direction I am moving in?”

9. Summarizing the Year

One way to summarize what you’ve discovered is to name the themes you see emerging for you for your year. A theme isn’t a goal, in that it’s not a specific or measurable outcome. A theme as the intention, the flavor, the guiding principle that you want to align with. Naming a theme can be a good way to simply hold on to an insight or awareness about what you want to stay close to this year.

Some of my main themes over the year have included:

- Feed My Soul
- Trust in Creativity and Inspiration as the Source of My
- Trusting in the Power of Me as an Expression of Divine Substance

Other themes, or supporting themes, might include:

- Creating Elegant Systems to Deliver Value and Lighten my Heart
- Be Vocal and Visible
- Allowing my Calendar to Orchestrate My Life
- Financial Integrity as a Form of Self Love
- Releasing What No Longer Serves

It’s also okay not to have a theme besides the names of your qualities.

Other ways to capture what you’ve unearthed this session about what you most desire would be:

- Making a drawing or painting or collage
- Buying a physical object that represents the feeling of your year
- More things I haven’t thought of

Session Three: Choosing and Adding Form

In this hour, we will continue to move from the Essence of what you desire, as defined by the qualities you want to experience, your Sacred Yearning, or your Magic Wand desires, into Form. Into enough clarity and detail that you have what you need to focus and to move.

1. Map Out What You Know

You may already know a lot about what is coming down the pike this year. Before we start adding lots of new things, take a moment to sketch out what you know is already in place this year. Next to each month, write down what you have already planned. This could include:

- Vacations
- Programs or Offers you are planning to make
- Events, Conferences, or Retreats You Are Planning to Attend
- Family milestones
- Household Projects

January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Looking at your chart, you should have a sense of the rhythm of the coming year, and how much space you have for something new.

2. Prioritizing

We live in such a rabid culture of self-improvement that we often feel we need to be achieving and excelling in every area of our lives.

So we strive to do excellent work, make good money, manage our money, be a good partner, a good parent, a good friend, and good son or daughter. We work on our bodies and health, try to eat well and exercise. We work on our creative projects, we try to keep a nice home. We donate and we volunteer. We do our spiritual practices and participate in spiritual communities. Maybe we are involved in politics or social change.

And it’s exhausting.

There is something to be said for letting ourselves off the hook somewhere in our lives. To have areas that we declare it’s ok NOT to excel. To give ourselves permission to do a C+ or even D- job of being a Parent Association member, or a housekeeper or a cook.

Studies suggest that we all have a limited amount of discipline. So the discipline we use to weigh ourselves every day, or plan our meals, or keep our house clean, or improve our memory is discipline that is NOT available for other areas, which may be more important.

I’ve been thinking a lot about this lately.

As I get older, I realize my time, my energy, and my bandwidth are limited. My ability to do what matters most depends on my willingness to let go of “doing well” in the areas that matter less. (The challenge is that these other areas still matter, they just matter less.)

What matters most is caring for my son, doing my best and most beautiful work in the world, being kind to myself, and writing my memoir. If I do justice to those areas, there truly isn’t much left over to excel or improve somewhere else.

So, in what areas can you allow yourself NOT to progress this year? Where can you let yourself off the hook?

Here’s an exercise I did this year.

Take this list of life areas:

- Money
- Work/Career
- Love/Significant Other
- Family and Friends
- Fun and Recreation
- Physical Environment
- Health and Well-being
- Personal/Spiritual Growth and Creativity

Now, compare two at a time. For example, look at Money vs. Work/Career. Ask yourself, “If I had to pick one of these to change (and the other to not change), which would I pick?” So if you had to choose between having your Money situation change (in any way you’ve identified as desirable) and your Work/Career to change, which would you pick?

Let’s say you pick Money. Now compare Money vs. Love/Significant Other. If you had to pick one of these to change, which would you choose? (Notice you are NOT choosing having money or more money over having your Significant Other. You are choosing having money change vs. having your situation with love or your significant other change.)

If Money is still the area you want to see change, compare Money vs. Family and Friends. And so on.

If you are patient, and compare each item to the other areas, you’ll create a clear hierarchy of what you want to change.

I suggest that you focus on no more than four areas as priorities, and accept that the others may not change significantly. (They may, often changes in one area will ripple out. The point is that you let yourself off the hook for making change in all areas of your life.)

For me this year, the order was:

- Money
- Love
- Health
- Personal/Spiritual Growth and Creativity

That means I am at peace if

- Work/Career
- Family/Friends
- Fun and Recreation
- Physical Environment

Largely stay unchanged.

3. Income Streams

If you have a business, and you want to grow your business, it’s good to name specifically which income streams you have and which income streams you might want to add to reach both your “inner” business goals (impact or satisfaction) and your outer business goals (income, profit, growth).

You may also need to decide whether or not to put down an income stream.

On a recent call for my membership group, a participant told me she needed to decide if she was going to continue offering a program, or let it go. She had a lot of heart and emotion tied up in the program, but it wasn't really working the way she wanted. Should she lean in, stick with it, commit, persevere?

Or should she cut her losses and put her energy elsewhere?

This is one of the toughest kinds of decisions business owners have to make, and one of the most common.

If you're in this situation, here's what I recommend.

Take some time to tease apart the situation. Ask yourself some good questions, and see what emerges.

Here are some of the more useful questions I think you can ask in this situation:

1. What would need to be true for me to whole-heartedly embrace continuing to offer this income stream?
2. What would need to be true for me to peacefully let this income stream go?
3. When it comes to this income stream, am I putting out more than I am getting back?
4. Is this income stream a loss leader for me? Even if it's not profitable in and of itself, does it lead to more connections, clients, income, etc.?
5. How is this income stream contributing to my growth and development?
6. Could the resources going into this income stream be better used elsewhere?
7. Am I avoiding another more growthful opportunity or income stream?
8. What would I believe it means about me, or the universe, if I let this income stream go?

If you have new income streams you'd like to add this year, consider where in your calendar above they might fit. Consider the time you would need to develop that income stream, test it, offer it, and enroll it.

4. Financial Projections

One of the scariest but most useful things you can do as you run your business is to make financial projections.

Financial projections include estimating timing and amount of income from each of your income streams as well as estimating timing and amount of business expenses throughout the year.

This can feel uncomfortable because the projections are made up. You aren't sure what will happen. But that's ok. Projections are supposed to be made up. The longer you run your business, the more data you'll have to make stronger estimates.

It can also feel uncomfortable because we can get caught between the yearning for the income we project and the reality of what we can bring in.

Nonetheless, doing projections of earnings and expenses can help you:

- Determine if you can, with your current resources, bring in the income you desire
- See the flow of income throughout the year so you can plan accordingly
- Determine what capacity you have for different offers
- And more

You can download a template for Financial Projections [here](#).

5. Teaching, Training, and Support

I am a learning junkie, so I love this part.

Make a list of all the programs, coaching, or training that you already know you want to invest in this year. Seeing what you want to invest in can help you make choices about new offers and new programs that come your way.

6. Projects

I currently am less project-focused than I used to be. I prefer to focus on my Qualities, and the Story of my New Year and make Project decisions as I go along. However, if you like more concreteness, here are some thoughts about working with Projects.

Why Projects and Not Goals?

First, you can do both. I tend to lean towards Projects over Goals. A goal is usually a declaration of a measurable outcome you want to create, while a Project defines an activity you plan to engage in for a specific period of time—whether it’s a week, a month, or the whole year.

Defining Projects keeps you focused more on the action than the outcome. The outcome matters, yes, but the outcome is not always under our control, as much as we might wish it were. We do, however, have control over the actions we take in service to those goals.

Knowing your Projects keeps you focused over time. In our Magnify Your Message Action Circle, we declare a Priority Project for each week.

When we set a goal, we usually do so assuming that achieving that goal will make us happy—and often we are wrong. Achieving the goal does not create the happiness, pride, or peace that we imagined, or we beat ourselves up because we failed to achieve the goal in the way we thought we would. However, you can feel success and satisfaction simply by virtue of seeing a Project through to completion, whatever the outcome.

In fact, in Hand Analysis, the Life Purpose of Success is defined by the ability to [a] pick a meaningful Project that is truly yours, and [b] see it through to whatever you define as completion. It’s a path we can all benefit from following.

When we pick a Project, we are called on to define the actions and efforts we think will be worthwhile to engage in. Whether or not those actions produce the results we wanted, we learn from the process. We build skill over time, we learn how big or how complex of Projects we can take on.

We achieve success, ultimately, not by setting ambitious goals, and worrying all year about whether or not we’ll hit them, but by picking challenging and worthwhile Projects and seeing them through to completion.

Three Kinds of Projects

Before you decide on your Projects, it can be useful to brainstorm possible projects for the year.

You can also try sorting your Projects into different categories to see more clearly, such as **Revenue Projects**, **Innovation Projects**, and **Development Projects**

Revenue Projects are critical for business owners. Revenue Projects are designed specifically to bring in revenue.

Revenue Projects might include: offering a new teleclass, repeating a successful live event, doing a Spring campaign to bring in private clients. It’s not unusual for business owners who struggle to make money fail to actually take on Revenue Projects.

So, if one of your desires this year is to increase revenue, make sure you are choosing sufficient Revenue Projects.

The truth is, you probably already know what some of the Revenue Projects are that you’ll take on this year. If your business is established, you may have offers that you regularly bring forward, say a teleclass, or a retreat, or a workshop, that you’ve offered before, and plan to offer again.

I suggest each of those offers or income streams be considered a Project. Write those down. For example, my key business projects each year include:

- My Action Circle
- My Words on Fire Training
- My Wild Business Writing Retreat
- My Firewalk Mentoring Group

Innovation Projects are projects that let you move into new territory and test out something which is calling you. For those who are Innovators at heart, these projects have a lot of juice and energy. They boost creativity and help you develop your intellectual property and business content. And they may not in the early stages generate revenue.

That said, last year’s Innovation Projects may become this year’s Revenue Projects. Innovation Projects often involve alpha or beta tests, or pilot projects testing a new approach, a new offer, or new content.

- Any new offering, private or group you want to bring forward
- Any new product you want to bring forward
- Any new marketing initiatives you think will forward your business
- Any new way you want to run your business

So what are **Business Development Projects**? Business Development Projects are projects designed to improve the overall functioning of your business, but which, *in and of themselves*, do not generate revenue. Business Development Projects might include:

- Revamping your web site
- Doing branding work
- Increasing visibility

Less established business owners often keep themselves busy with Development Projects and end up with little or no time to pursue Revenue Projects. Why would someone do that? Because Development Projects are less likely to expose you to rejection.

That doesn’t mean you shouldn’t have Development Projects, but keep in your mind that if you want to increase your revenue, Revenue Projects should take priority. Development Projects should feel like they are helping you to more fully align with who you are and what wants to come through you, and to express that in the world.

At this stage of the game, though, I don’t find it useful to break these down into smaller projects. I am looking to name the larger containers for my activity this coming year.

Using Themes to Inspire Projects

Another way you can generate Project ideas is to go back to your qualities and themes. So, if your themes for the year were:

- Creating Elegant Systems to Deliver Value and Lighten my Heart
- Be Vocal and Visible
- Financial Integrity as a Form of Self Love

You could ask, “*What specific projects would reflect creating elegant systems to deliver value?*”

So, that might produce the following this list of POSSIBLE projects (Note that you are just in the brain dump stage, you have not committed to these, nor do you need to take these on):

- Revamp the website.
- Create system for lead generation.
- Build stronger referral relationships.

What specific projects would allow me to be more vocal and visible?

- Do a video summit in the spring.
- Do a weekly video cast.
- Book local speaking gigs.

Personal Projects

The intention is for you to have a great life. What personal Projects are you considering taking on that would enrich your life?

Streamline Your List of Projects and Goals

If you’ve gone through the previous steps, you may now have 10 or 20 Projects and Goals. In most cases, trying focus on them all will make you crazy and undermine your ability to successfully complete any of them.

There is no one right number of Projects to commit to. Some Projects might be more complex and encompassing, others more defined and time-limited.

Intuition and Guidance

Your body may communicate to you which Projects are uplifting, inspiring, energizing, or grounding, and which feel unbalanced, incoherent, or disconnecting.

Breathe in your wanting, your longing for all those qualities you defined in our first session. Allow yourself to want something without knowing for sure if you can have it. Let that desire shape the Projects you choose

You may also want to access your guidance in other ways, such as muscle testing, use of a pendulum, or any other tool you know. A simple question you can ask in these cases is, “Is it in my highest good to take on this Project?” or, “Is it in my highest good to pursue this goal?”

A Project Worth Pursuing

Another good test for a Project or goal is to ask this: “would this Project or goal be worthpursuing even if it took three times as long and was three times as hard as I think it will be?” If you can genuinely answer yes, that’s the sign of a good Project or goal. (Guess what? Most meaningful goals do take at least three times as long and are three times as hard as we think they will be.)

Time Frames

One of the most powerful ways to make your Projects and goals more real and bring them into form is to place them in time. Projects are just good ideas until they land in your calendar and demand attention.

One organization book I read said, “A to-do list is like a credit card, but a calendar is like a bank account.” Why? We can make our to-do list endless, but a calendar makes vividly clear what we can and cannot take on. What we do and don’t have time for.

Look at each of your Projects. When will they happen? Over what period of time?

There may be some natural time frames built in to some of your projects. If one of your projects is to travel to Europe, you may already know that that will need to happen in the fall.

Or, there may be a natural sequence in your projects. You need to create your next information product, for example, before you can sell it.

You may have a routine for what you offer when. Does this schedule work? Do you want to change it?

Maybe some of your projects can be implemented right away, giving you an immediate sense of a shift, and giving you more energy to work on the remaining projects.

I like to make a graph in my notebook. I take the long side of the page and write out the months of the year. Then I make a bar to represent each Project, showing which Projects are happening when. This helps me see what fits, where too much is going on, and where natural openings are to fit in new Projects.

Session Four: Healing What Wants Healing

In my 24 years in business, what I’ve seen is that most of our business growth comes NOT from learning new strategies and techniques, but from shifting our healing stuck or frozen places that limit our energy and keep us from taking full, whole-hearted action to get what we want. To address the deeper, inner pain that takes us out of the game when we hit an obstacle.

1. Naming the Old, Sad, Stories We Carry

Having a business is a great way to bring up and work through all your emotional issues. Nothing will test your belief in yourself, your clarity around your value, like creating a business and making offers to the world in exchange for money.

Nothing challenges your fear of survival like the cash flow ups and downs that are a usual part of establishing a new business.

Nothing tests your belief in being enough like constantly being offered training and coaching programs.

For most of us, the drama of business boils down to a few familiar stories.

My stories (most deeply activated around money and love) usually boil down to variations on:

- I am invisible
- I am not good enough
- I am not worthy of love and attention

What are your most painful, old, familiar stories you tell about yourself and why you don’t have what you want?

2. Shifting Our Energy

The more you accept that these stories are running under the surface, the more quickly you shift out of the operational (what do I need to do to enroll my next group) and the more you recognize you’re doing another round with one of your old stories.

Once you’ve realized you’re being run by an old story, you have the opportunity to shift it. There are many, many excellent tools and techniques, as well as practitioners, who can help you shift these old beliefs and these old stories.

Some of these include:

- Talk therapy
- Trauma work
- Emotional Freedom Technique (also know as EFT or Tapping)
- Ho O Pono Pono
- The Work of Byron Katie
- NLP
- Hypnotherapy
- Reparenting or Working with the Inner Child
- Prayer
- Self-soothing

If you know one of the above techniques, I encourage you to use it more consistently in your work. Learning more of these techniques can be a good use of your time and energy.

One of the simplest is to accept and forgive the part of you that holds judgment, blame, or shame around some part of yourself. That could look like:

Center in the Divine in whatever way makes sense to you. Say center yourself in a column of light.

“I accept that I judge myself as not being smart enough to have a successful business.” (*Breathe in, and breathe out to release.*)

“I forgive myself for judging myself as not being smart enough.” (*Breathe in and breathe out to release.*)

“I forgive the part of me that judges myself as not being smart enough.” (*Breathe in and breathe out to release.*)

3. Turning Towards What is Challenging

One of the challenges of the New Year is that we often every New Year, commit to tackling some area of our lives that we’ve persistently found hard to change.

Maybe we just can’t seem to change our financial picture.

Or we struggle with marketing and enrollment.

We struggle with our bodies. How they look, how much energy they have, how strong they are.

We struggle to keep our homes clean and neat and beautiful. (*If any of you are tracking, I still struggle with this.*)

There can be something profoundly disheartening about tacking the same goal or intention over and over and over again.

And yet.

If we left them, these challenging stuck areas can be our invitation to growth. They can bring forward the old, sad stories. And they can also be our teachers.

If success in a given area continues to elude us, we are being asked to approach things differently. We are being asked to challenge old assumptions and to redesign old ways of doing things.

Within an area of challenge, we can ask questions like:

- What painful feelings does this stir up in me? How can I heal or release or accept myself in the face of those painful feelings?
- What have been my underlying beliefs and assumptions about how I will experience change in this area?
- What can I see now is not working about that approach?
- What other approaches are possible?
- What would be the opposite approach to what I’ve been using?
- How can I bring more love to the table?
- How can I bring more of my Qualities to this area?

If you can start to see the persistent struggle, not as a sign of failure, but as an invitation to go deeper, and to shift something profound, they become less painful, and even a blessing. And, you may find that the lessons in that area of your life can be applied to other areas.

4. More Ways to Pivot

If you want some area of your life to change, you will likely need to shift how you are going about things in that area. Here are some principles to consider:

Staying the Same

Having looked deeply at the past year, you have some sense of what worked.

What will stay the same as you pursue the things you most desire?

What feels like it’s putting you on the right track?

Don't Forget Your Qualities

Qualities are super useful as you consider how you are going to accomplish what you most desire. If you want to grow your business, how can you do it in a way that supports you in feeling:

- More peaceful
- More confident
- More playful
- Or any other quality that you chose?

Core Gifts and Strengths

Alongside Qualities, you can also explore using your Core Strengths and Gifts to help transform some area of your life.

For example, maybe some of your Core Gifts are: kindness, exuberance, creativity, and verbal expression.

You can look at an area of your life and ask: “How might I activate more of my Core Gifts and Strengths in this area of my life?”

How Simple Can You Make It?

One of the reasons business owners suffer is that they design elaborate and complicated strategies to accomplish business goals that could be accomplished with much less effort.

In part, this is because there are so many experts out there telling us we have to do THIS, and we should do THAT, and we lose the detail and the refinement that tells us whether or not any particular strategy is right for us at this time.

For example, you can often generate more revenue by simply reaching out in a few places to people who already know you to suggest that you work together.

Or, you can ask existing clients if they would like to do more work with you, or work with you on a more regular basis.

Or, you can experiment with some straight forward ways to invite more people to have sales conversations with you.

Often, we make up rules and give ourselves lots of work so we don't have to do those simple, but scary, things. We decide we HAVE to put up a new web site, or build our list, or blog weekly for at least a year in hopes that we'll be off the hook for actually asking to be hired. For having to feel vulnerable, or awkward, or needy and asking someone if they'd like to work with us.

If you pick a simpler, more direct business strategy, it often takes less time and less effort to produce the results you want.

Look skeptically at all the things you’ve been told you **MUST** do. You don’t need a business plan if what you’re doing now is sustaining your business. You don’t need to market heavily if you currently have the clients you want and the type of clients you want. You don’t need to niche if you attract diverse clients in the numbers you want and you enjoy the diversity.

The goal is not to do everything you can to grow your business, it’s to do just enough to produce the results that matter most.

You can also look at the Bonus Handouts for some thoughts on growing a purposeful business, and moving more fully into the energy of Promotion.

5. Staying in the Game Longer

Often, when we aren’t getting what we want, the sadness, anger, or frustration causes us to shut down. To sit out the game. The truth is building a business based on your original work and expression takes time and trial and error.

If we can use the techniques above to keep meeting ourselves in those painful places, and to heal and growth through them, we not only stay in the game longer, we stay engaged and present and visible in the ways we need to to get to the point of growth.

Expansion Through the Awkward

When we want to grow and change, we accept that we will be moving out of what is comfortable out to the edges of both our inner and outer landscapes.

Where do you need to be willing to be awkward, uncomfortable, clumsy, or inexperienced in order to expand in the ways that are needed?

Vulnerable Exposure

If we want to live in the world in fullness, with meaning and depth, we need to allow what is in us, what is alive and true and powerful, to be visible to others. Whether this is speaking your truth more clearly to family and friends, being less careful on social media, or seeking out uncomfortable ways to reach more people, keep asking yourself where you can show up more fully.

Intimate Endurance

Almost anything worth getting or creating requires repeated efforts and progressive refinements over time.

Intimate Endurance means we stay engaged in the ongoing discovery of who we are as souls, in our sometimes awkward efforts at expansion, and in our practice of exposure past the limits of our patience, past the boundaries of our expectations.

Where do you need to hang in longer?

Bonus Handouts & Worksheets

Bonus: How We Grow a Purposeful Business

If some of your goals and desires are around growing your business and your income, then it’s useful to have some sense of HOW you are going to do that.

There are many school of thought and teachings around how to grow your business. Some focus on basic business and marketing principles: sorting out what you are selling and who you are selling to, and balancing the costs of the business with the income brought in. These are good basic principles to work with.

In recent years, there have also been a lot of people teaching high-pressure sales tactics that involve triggering unconscious buying decisions using elements like scarcity, authority, and reciprocity to create more sales. Other approaches have focused on making very high-priced offers (which usually require the higher pressure sales tactics described above, unless you target affluent clients.) Strikingly, these approaches put very little emphasis on delivering really excellent work.

Recently, on Facebook, I was railing against what I consider to be “infantilizing” marketing, marketing that positions the business owner as the wise, noble expert, and the reader/potential client as the naïve, lost soul who without proper guidance can’t find their way out of a paper bag.

And someone rightly asked me “but what does work? If we don’t do this kind of marketing, what do we do instead?”

It’s such a good question.

It’s something I am living into. Experimenting with. Practicing myself.

It seems clear to me that a different approach has to be a deeper, slower, long-game approach.

I am really interested in one kind of business, and that’s the kind of business that allows you to do the work that makes your heart sing. The kind of business that helps fulfill your sense of meaning and purpose in this lifetime.

In the 24 years I’ve been in business, this is what I see makes that possible:

1. Get Clear Where Your Magic Lies (the True Spirit of Your Work)

I believe we all have what I call a Unique Access to Universal Wisdom. There is some aspect of human existence that we get, that we understand more deeply than anyone else. When we base our business on this “access to wisdom”, we create a business that is unlike any other. We create a business that perfectly matches who we are and what we are most gifted at delivering. We create a business that is deeply fulfilling and meaningful for us to run.

When we know who we are and what we bring to the table, it gives a wonderful clarity and sense of pride to what we do. It gives us energy to step out into the world, and it gives us something to talk about when we do.

I do this deep archeology work with clients privately and in my Words on Fire training. I call this Gateway work, and it involves defining the True Spirit of Your Work and your True Wisdom.

2. Build Experience Doing Your Best and Favorite Work

One of the big mistakes new business owners can make is not getting enough practical experience doing the special work they want to do to feel confident. Working with many of the type of clients you want to work with doing the kind of work you want to do gives you evidence of the value of what you offer. If you don't feel you have a strong track record producing the results you promise, if you aren't very clear that you can reliably deliver the results you promise, you may need more experience.

One assignment I frequently give new coaches is the Practice Practice. That means bringing in something like 5-7 people who represent your ideal client at the same time so you can take them through some reasonable set of sessions and observe the results. This gives you a sudden and intensive experience of working simultaneously with a number of clients so you can both see how it feels and see how it works.

In order to do this, you reach out to people you know (or people that people you know know), and inviting them in. Whether you do this for free, or for a reduced fee is up to you. (I assume that if you could do this easily at your full fee then there really isn't a business growth issue.) In this case, you are temporarily trading some potential income for the experience you want to have. You can also ask for feedback and willingness to be a case study in exchange for your discounted work.

What you learn in this kind of a situation is priceless. I've had clients discover that they really don't like working with the people they think they want to work with! Great to know BEFORE you invest in a new web site, business cards, and so on. You may realize that the results are a little different than you thought, take more time, or require a different kind of support.

You may find there are some gaps. Some ways you aren't showing up fully or doing your best work.

Or, you may absolutely confirm this is the work you want to do. You may get direct evidence that you make a big impact.

On a practical level, you can often turn your Practice Practice clients into paying clients at the end of your agreed upon work time.

If you are not in a private practice, and are offering groups or programs, the same principles apply, though I usually call this the Beta test or the Pilot program.

The goal is to bring a group together as quickly as possible to both discover what works and what doesn't, to build a track record of doing what you promise, and to build your confidence in your value.

3. Test and Refine Your Offers

By doing the practice above, you gather good feedback about what works and what doesn't with your offers.

The more you take in that feedback, and allow it to shape what you do, the faster you move towards having strong, delicious, excellent offers. (Which make growing your business much easier. You tend to get stronger word of mouth and develop a reputation for doing amazing work.)

This means a couple of things.

First, you will want to build time in to your planning to tweak, upgrade, and refine your offers in response to the feedback you get. You will want to keep challenging yourself: “How can I make this better? How can I create a better experience? What will allow my clients to get better results?”

For example, I’ve been teaching my Words on Fire program (previously known as Put the Mojo in Your Message and Work on Words) for something like 15 or 17 years. First it was a series of one-month seminars. Then it was a 16-week training. Then it became a 32-week “mastery” training. Then, it became a 21-week training, and this fall, I added a Strategy component to the existing curriculum. The program was popular from the start, but every time I offer it, I find small and large ways to make it a stronger, more effective program.

You can do the same if you work privately with clients. Keep looking to what will elevate or intensify their experience.

4. Create Your Book of Language (Potent Expression)

Once you know your special magic, you practice expressing that magic through your offers (through your practice and development of what you do). As you go through that, you will continue to develop the language and vocabulary that helps you claim and communicate what you do.

Your Book of Language is the collection of language, of words and phrases, and concepts and ideas, that makes your work uniquely yours. The language that makes what you do sound different from what everyone else is doing.

Your Book of Language acts as a kind of talisman -- a powerful tool to harness, condense and hold the magic and magnificence of who you are. Your inner language that guides you and the outer language you share with the world.

The language that supports you in stepping out into the world with the full force and power of your being.

You develop your Book of Language by digging deep, and answering the big, hard questions about who you are and what you want others to feel and experience.

Potent Expression is the outcome of developing our Book of Language: writing and speaking in a fierce, unflinching way from a deeply rooted place about the things that matter most to us.

What I know is that when we bend and shape and shift ourselves to try to fit what we think the market wants we come across as bland, as unoriginal, and as uninspiring.

And when we find our center, develop our distinctive vocabulary, practice speaking without restraint, we show up differently. We touch people more deeply. We come out of the fog and into full focus. We inspire.

Before we try to do more marketing, better marketing, we want to make sure we have found our way to our most Potent Expression. In our Potent Expression, everything we do has more impact.

5. Pursue Your Ideal (Sane and Sustainable Strategy)

So much of business and marketing training tells us to shape ourselves to the world, to the market, to the client, to anyone and anything that will let us supposedly make more sales.

To me, the reason to have my own business is to see if I can create the opportunity to do the work I love the most.

And that means shaping the world to what I desire rather than shaping my desires to fit the world.

When I do strategy and marketing work with clients, I use the principle of start with your ideal.

Shape and create your ideal work.

Develop your ideal offers.

Offer them to your ideal clients.

Yes, real life will give you input, inspire refinement. But start with your ideal.

Doing so infuses your work with an energy and excitement which otherwise isn't there.

I always ask Strategy clients to tell me their ideal work life. The one they'd create with that magic wand. It might not be something they can build today, but we want to know what it is, name what it is, so it informs what happens now, and guides us in that direction in the future.

6. Speak Publicly Frequently about Who You Are, What You Do, and What You Believe Matters (Sufficient Visibility)

Once you are offering work that is aligned to the clients you love, you need to make sure the people who need to know know about you. Know you exist. Know what you offer. Know why it matters.

You need Sufficient Visibility. Sufficient Visibility is showing up consistently and frequently in the world in your Potent Expression so that your right people can identify and move towards you.

You need to find the places you can show up and share.

You need to show up there and share the best of who you are.

Over and over.

Regardless of the initial response.

Showing up needs to happen regularly. Become a way of life.

You are here to be the advocate for your special brand of goodness. Keep showing up for it.

Sufficient Visibility is where we look at the volume and frequency of where we show up and compare that to the results we are getting to determine if it's enough to produce the results we need.

Sufficient Visibility also requires we consider our stamina and energy, so we can sustain our efforts to be present and visible in the world

7. Keep Making Offers (Straightforward Marketing)

Your business grows when people buy your programs, products, or services. You can make the sales you need without manipulation or heavy-handed sales tactics. You can use Straight-forward Marketing.

Straightforward Marketing is direct and unapologetic sharing of who we are, what we believe, and what we offer.

Straightforward Marketing has two key components.

First, it's marketing without hypes or tricks. Without any subtle manipulations. Without invoking fear or shame. It's about trusting that if you simply and clearly present what you do that the right people will be able to say yes.

Moving into Straightforward Marketing requires dropping all pretense and artifice and allowing people to see clearly who you really are. It requires operating from the belief that you are enough, just as you are.

Second, it's marketing that is up front about the fact that you are a business owner, you offer products and services, and you'd like to be paid for them. No shame. It's about developing comfort showing up and asking for a sale.

8. Continuously Reach for Deeper Alignment and More Potent Expression

As you do your work in the world, you evolve. And your work evolves along with you.

You will see new things about yourself. You will learn more about your audience.

You will activate your creativity.

A healthy, thriving purposeful business will challenge you to keep dropping into new levels of clarity, of alignment. A healthy, thriving purposeful business will ask you to keep stretching, to keep learning, to keep innovating.

And out of that comes newer, richer communication.

The next level of your work. The next level of your expression.

What is emerging are three building blocks that let us be effective without the funky tactics:

Bonus: Stepping Into the Energy of Promotion

When it's time to grow the private practice, or enroll the next workshop, we move into Promotional Energy.

There is a different way we need to show up and engage during the time we are promoting. Marketing, selling, promoting call us into the energy of Expansion. It calls us to present and sustain a larger, more vibrant energy to the world than when we are hunkered down at home, nose down, doing our work and minding our own businesses.

Specifically, effective Promotional Energy requires that we set an intention for a result, and hold that intention even in the face of no movement or response or slow movement and response. We want to hold an energy and presence within ourselves so that we continue to take appropriate, engaged action to continue to invite and call in the results we want until the promotional wave is complete (that could be when we close registration, or at a set time when we've decided to rest).

When I am in Promotional Energy, I like to hold the image of a sail filling with wind, growing full and taut in a way that propels the boat forward. I am the sail, and Promotional Energy is the wind, lifting me, animating me, giving me power.

In our businesses, it's pretty much guaranteed that we will play out our old sad stories. There are few things that test our inner beliefs about value than offering something for sale. There are few things that test our experience of being visible or invisible, good enough or not good enough, than extending an offer and having to ride the wave of response, whether it's good, bad, or indifferent.

The most common challenge I see for my clients who are newer or less established in their businesses is that the feelings of discomfort around promotion can become so overwhelming that they either never get out of the starting gate, their efforts collapse in the face of what feels like no response, or the actions they take are weak or ineffective, colored by a sense of doom or despair or futility.

When I work with clients, I find that the mechanics of promoting are less complicated to figure out than this energy piece. Your management of your own Energy is probably 80% of the game, and the actual choice of mechanics to promote about 20%.

When it comes to figuring out the mechanics of Promotion, I like to look at the following principles:

Start with your Ideal

When it's time to promote and sell your thing, start with your ideal, and then adjust from there.

Offer your ideal thing, the thing you really want to be selling, not the thing you think will sell. Sell the coaching package you are going to be thrilled to sell. Offer the teleclass you are most excited about offering.

And offer it to the people you most want to be working with. The kind of clients you love and adore and do your best work with. Something shifts when you name and reach for these clients, instead of looking around frantically for whoever will work with you.

The energy of offering something you love and are excited about to people you are excited to be working fuels the effort.

Wrap Your Arms Around the Project

Before I start a promotional project, I fill out a Promotional Overview template I create for myself. (I also share this in my Action Circle and my small coaching groups.)

In it, I answer questions about what my desired outcomes are, what I want people to feel and experience, not only from the offer itself, but in my marketing, why I think this offer needs to exist, who it’s for, what exactly the offer is, and how I’ll promote it. Filling this template out is how I muster the focus and energy to then step out into the world.

Plus, as I focus my energy and answer the questions, I am often creating snippets of language that become part of my marketing language.

I now find I don’t feel sufficiently clear or energized until I’ve filled out this form.

Step up to Claim the People You Want

Part of stepping in to stronger Promotional Energy is to step in to the energy of CLAIMING your clients. To me, claiming clients includes feeling deserving of those new clients and taking the initiative to reach out and invite them in.

In most cases, I recommend clients start a Promotional Project by making a list of real humans they know who they would love to have as clients or participants in their next program.

Next? Reaching out personally, using wacky things like the phone or personal email to extend an invitation.

Choose Your Visibility Channels

I got this idea of Marketing Channels from Fabeku. We all have channels we can use to reach out and put ourselves out in the world. That channel may or may not be one we’ve nurtured. It may or may not be one that we use consciously and effectively, but we all have channels we can access.

There are online and social media channels, but there are also real-life, human channels we can use as well. Your personal network, family, friends, colleagues, neighbors may be a resource that you are not fully using.

Common channels my clients use are:

- Facebook (*this includes your personal feed, your business page, ads, FB Live, and any groups you administer, so more like five possible channels.*)
- Twitter
- Linked In
- Instagram
- YouTube
- Email lists
- Personal Email (to contact real humans you know)
- Snail Mail (to contact real humans you know)
- Phone (to contact real humans you know)
- Networking Groups or Events
- Affiliates and Ambassadors

In most cases, you’ll do well using one to three channels in a very focused, deliberate, frequent way, rather than trying to spread yourself across many channels.

Choose Your Visibility Recipients

Another grouping that ties in here, though they aren’t strictly channels, are the groups you are part of, the groups you have access to. Those might include:

- Your Family and Friends
- Your Current Clients
- Your Past Clients
- Your Colleagues
- Your Followers
- Followers of People You Know
- Readers or Listeners of Existing Media Channels (newspaper, radio, etc.)

Obviously, what you’ll communicate will depend on who you are communicating with. You might be asking past clients, friends and family, and colleagues for referrals. You might be inviting past clients to return. Or you might be inviting followers to go deeper.

Choose Your Visibility Frequency

Once you’ve chosen your channels and your recipients, it’s time to figure out how often you are going to reach out during a particular time period.

For example, I frequently market with a combination of Personal Outreach, Facebook (personal feed), and my email list.

Personal Outreach doesn't really have a frequency since you pretty much reach out to the people you know who you think might be interested and ask.

But for Facebook, I might decide I'll post a daily content “sound bite”, a longer piece of content three times a week, and actual offers three times a week.

For my email, I might decide I'll do a series of five emails during that same time.

Create Your Visibility Content

Now that you know where and who and when, you can write your content. In the example above, I might generate my social media content and put it in my scheduler.

Then I would further decide what my email sequence would look like. For example, for this Annual “Planning” Day, I will have sent five emails. The first was a straightforward “here it is, come sign up” email. The second two emails were articles that concluded with an offer to join the day, and the final two were straight forward messages again, reminding people of the event and encouraging them to join.

Once You Are Moving

Once you begin to execute your marketing, you get to face the response. Our biggest enemy at this point is the feelings and stories that get activated.

For time-based offers (say a teleclass), you'll usually get a wave of response at the beginning, and a wave at the end. But in the middle, things may go very slow and very quiet. And that's when we sometimes panic. Or decide that we are going to fail. And that can affect whether we continue to put the word out, and the energy with which we put the word out.

The game, as I mention above, is to keep holding the vision of what you want, the number of new clients, the participants in the program, regardless of how quickly or easily people are coming in the door.

To keep releasing the fears and doubts and beliefs you have about yourself, your potential clients, and the world, and to keep engaging, keep offering, and to keep your heart open for the next person to say yes, or for the final participants to slide in at the last minute. Believing that the right people who will benefit deeply are out there, and to keep doing your work to let them know you're here, to keep making a case for the value of what you do, and to keep offering long enough that they can come round to you.

My mantra, particularly in the final weeks of an offer, is to keep telling myself “I am so curious to see who will show up.”

Bonus: Moving Forward Faster by Making Better Decisions

If you want a successful, profitable business, sooner or later you need to develop your skill at making decisions.

Because in a funny way, business is nothing more than making a series of decisions and acting on them:

- Deciding what business you are in.
- Deciding what to call yourself.
- Deciding how to articulate what it is you offer, what you bring to the world.
- Deciding what income streams to offer.
- Deciding when to offer them.
- Deciding how much to charge for them.
- Deciding who to market to.
- Deciding who to study or mentor with.
- Deciding how much to invest in a virtual assistant or a training program.

We feed procrastination by not deciding. Not deciding which project to work on. Not deciding which article to write. Not deciding which audience to speak to.

Not deciding means we have an excuse for not acting. And while that can calm our lizard brain that is afraid of change, it raises the anxiety for the part of us that is committed to creating work in the world that is lucrative and fulfilling. To find fresh ways to earn good pay sharing the wisdom we’ve developed in this lifetime.

One of the practices that supported me in breaking through with my income was simply keeping a running list of all the decisions I had not yet made. And then using some time each week, or each day, to go through the list and decide.

That said, despite what you’ve heard, faster decisions are not better decisions.

According to Human Design, we are all wired differently when it comes to making decisions. Some of us can make instant decisions from our intuition or gut.

Others need to move through an emotional cycle, which can easily take several days.

Some need to talk to and bounce things off of others to discover what is right for them.

A very small percentage need a full month to reflect before making significant decisions.

(Human Design is a complex and fascinating system. You can get a free chart at www.jovianarchive.com using your birth information. This chart will tell you your Authority, which is your way of making decisions, and you can learn more through a variety of books or through online videos.)

I recommend you find a way that works for you to make good decisions in your right time frame (don't short cut your own need to process, but don't let yourself get stuck agitating without making progress.)

The smart and complicated often struggle with being able to see any situation from multiple points of view simultaneously. To seeing the pros and cons of every possible choice. And that can be paralyzing. We all need a way to cut through the endless internal back-and-forth, and pick the path that we'll move forward on. I am wired to make quick, intuitive decisions, and among other things, I use a pendulum, or what's known as dowsing. It gets me out of my head, it taps into what the bigger, less conscious part of me knows and wants, but mostly it gives me an answer, right or wrong, so that I move forward.

But it's up to you to find a method that works for you. It could be muscle-testing. It could be flipping a coin. It could be using the Sufi practice of Remembrance. It could be talking to your body about how the choice feels.

While it could be relying on a partner, a mastermind group, or a mentor, ideally it's a method that connects you to the clearest, wisest part of yourself and to the part of you that can go beyond logic, or mass consciousness, and truly sense what is right for you. For nearly everyone, the key is to tune in to your body, to allow your body rather than your mind to guide you. So, you can start right now—

What decisions haven't you yet made about your year? List them here:

Now, using your best method and timing, move through and make the above decisions.