2024 YOUR YEAR

Planning Your Year Right Workbook

BY: TAMMY DURDEN
BUSINESS COACH | SPEAKER | COURSE CREATOR

	URGENT	NOT URGENT
IMPORTANT		
NOT MPORTANT		

(Chart is Based on the Eisenhower Matrix)

Reflecting on 2023

Reflect on the year so far, what do you feel went well in 2023?

Your Top Win for the Year:

What is something you consider a disappointment this year?

Why do you think you had this disappointment (processes not set up, a employee issues, lack of sales, or other reasons)?

Why do you think you had this win this year?

Reflecting on 2023

Going back to your win(s), did strategies, actions, or mindset help you to achieve these win(s) in your business?

What changes or improvements can you make so 2024 is a better year?

What specifically will you incorporate into your 2024 plan or goals - be specific?

What will you leave out or change in your business for 2024?

2023 Revenue

Reflecting On Your 2023 Financial Year

What were your 3rd quarter revenue figures?

Do you know the first half of 2023 revenue?

What was net profit in the first half of 2023?

If you offer services or products, list those below (for those offering multiple products &/or services I recommend an excel worksheet)

Items or Service	Price

2023 - 2024 Revenue

Are you hitting your revenue goals (yes/no)? If NO, why not?

Are you hitting your net profit goals (yes/no)? If NO, why not?

What changes, if any, can you make in 2024 to bring in more revenue and make more profit?

[May mean you need more revenue in general, or perhaps your expenses are too great, and you need to make cutbacks or even personnel changes].

Also, Consider whether your pricing strategy is right or needs to revised.

GOAL SETTING

How will you achieve this goal in steps? Now take and break down each step into Micro-Steps with deadlines so it will be easier for you to achieve these.

You can complete this on the table provided in the next page.

EXAMPLE

You may have listed to offer another specific service, we will say you are going to offer 1-on-1 Real Estate Coaching to help new Realtors make it in business.

Let's see what you may have to do to begin to offer this service.

(I suggest doing these on separate paper or in your journals):

GOAL: Update Your Website	
STEP 1	MICRO STEPS
Set up information on your website	1. Contact your website developer. 2. Set up a meeting. 3. Send your website person the write up or copy for this service offering. 4. Review finished page(s)and approve or send changes to your developer.

GOAL SETTING

Your Turn: Take Your First Step and break it into micro-steps.

1st Step In Your 2024 Goals:	
STEP 1	MICRO STEPS

I recommend to continue the steps and micro-steps in your planner or journal if possible

ACCOUNTABILITY

Choosing an accountability partner is not always easy. Not everyone will share your passion, drive, and enthusiasm for their business. Although opposites do attract and can open our eyes to new ways to doing things, however, in business you may want to choose someone similar at least in passion, work ethic, and determination to achieve and be successful.

Think of first three people that come to your mind right now and put their names below:

1.

2.

3.

Commit to reaching out to at least one of these people this week.

GROWTH PLANNING

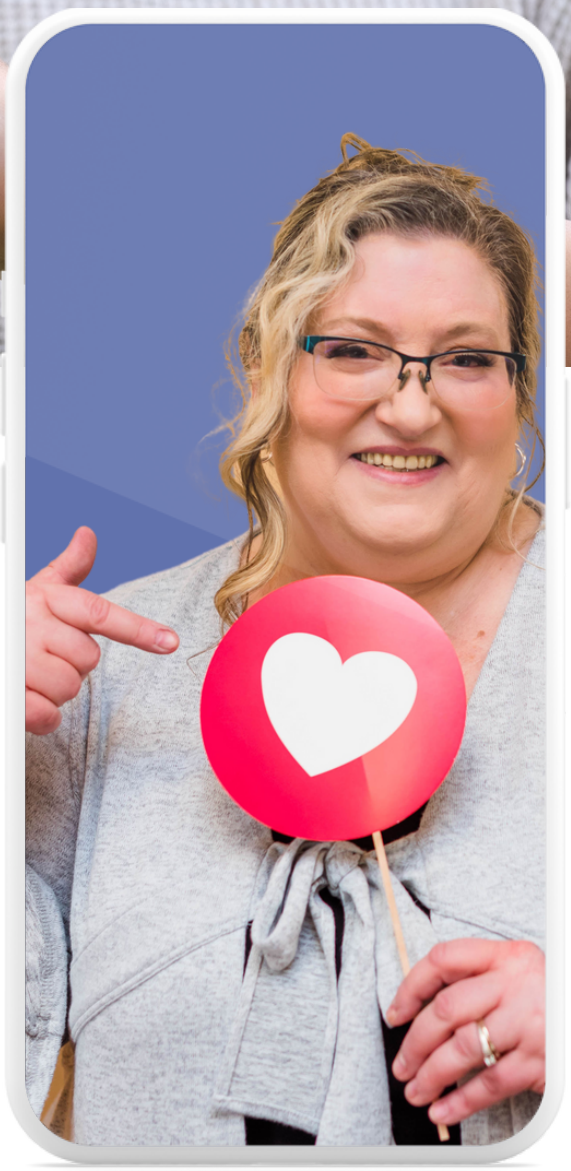
Planning for growth is what we all strive for but is not always what we plan for in the end.

In what way do you want to grow in 2024?

How will achieve this growth goal?

Viewing your goals already documented, including revenue, what do you think it will take for you to make all of these goals (what would have to change compared to 2023?)?

Thank you!



I am Tammy, business coach, speaker, and course creator. I am passionate about empowering women to...

...find your purpose
...find your passion
...help you create your business
...grow your business
...and scale your business

Thank you for attending the workshop. I hope you found value in what was discussed today. I'd love to hear your takeaways.

If I can help you in anyway please reach out to me or set up a Free 20 Minute Mini-Session.

Tammy S. Durden
Founder & CEO
Fearless Business Boss
www.FearlessBusinessBoss.com

T: 804-250-5556 C: 804-385-6201

E: tammy@fearlessbusinessboss.com