

Intentions & Daily Actions Worksheets

Here are the 3 ways that help me stay focused on my business initiatives and activities. The prerequisite to these tools is having a clear picture of your annual and quarterly goals.

Set Monthly Intentions

At the start of each month, I set monthly intentions by answering the following questions:

1. Based on my overall goals this quarter, what do I want to achieve this month?
2. What projects do I want to move forward on? What specific areas of those projects do I need to work on? What results would show up once I complete those areas?
3. What \$\$ Revenue do I want to bring in?
4. How many VIP Clients do I want to attract this month?
5. What programs do I want to launch and how many people and what \$\$ do I want to attract?
6. What kind of infrastructure do I need to setup this month to support myself for growth?
7. Who do I need to reach out to in my Sales/Marketing efforts?
8. What programs/products do I need to create this month?

Turn each answer above into an intention statement. Intentions are a statement of purpose. Not what you will do but the result you want to achieve. They are stated in the present tense. Setting intentions allows for the “how” to show up in many ways. Feel free to write them in the worksheet ahead. E.g.

By the end of Q2:

- I bring in \$15K or more in revenue
- I attract 4 or more VIP Clients
- The first 3 modules of my Home Study Program are completed
- A date and location for my 2-day retreat is locked in
- Sales Page for my 2-day retreat is completed
- 80 or more people sign up for my preview webinar for the retreat and 7+ sign up for retreat

Set Weekly Intentions

Every Monday, I set weekly intentions by answering the same question above but the context is what you want to achieve this week (vs. a month)

Set Daily Action Plans

Every day, I make a list of all my daily action items and I set one overall intention for the day. Make sure each action can be done in one sitting (as you’re more likely to accomplish it ☺). For example:

Intention for the Day: Focus & Fun

Daily Actions:

- Update my “About” Web site page and add credentials
- Send 1-pager Speaker Sheet to Bob G.
- Follow-up with Carlie’s Email
- Listen to Ronda’s Group Call
- Create Specs for Banner for Corporate Training page
- Update Corporate Training 1-pager

Monthly Intentions

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