



2017 DREAM PLANNER Flourish & Thrive Academy

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Your DREAM Business Planner 2017

In this planner, you'll discover:

- How to align with what matters most: vision, mission, core values & evaluation
- The framework for your Dream Year: Intention and Goal Setting
- Making that dream a reality: Planning

"If you don't know where you're going, you'll probably
end up somewhere else. "

- Zig Ziglar





SECTION 1 **ALIGNING WITH WHAT MATTERS MOST: VISION, MISSION, CORE VALUES, EVALUATION**

Authentic business growth, pride in your brand, and satisfaction sharing your art with the world are the DREAMS of almost every jewelry designer. Unfortunately, those things are easier said than done.

A lot of designers get stuck because they aren't crystal clear on what they want in business and lifestyle. That is why this is our step one. We're going to walk through setting the vision, mission and core values for your business in the exercises below.

Company Vision Statement

The overall vision of your business consists of many areas including where you see your jewelry sold, how much income you'd like to take home, how large you'd like to grow your business, your overall brand message and the type of lifestyle you aspire to.

In the space below write out your vision for your business. If you're a visual person (we are artists right!) it can also be helpful to create a Pinterest board for your vision.





Company Mission Statement

The purpose of your mission statement is to condense your entire vision into a simple sentence (or maybe two).

It can be difficult, but creating a mission statement is super important for your brand! On one hand, it is a way to clearly and concisely communicate your vision to the outside world. But it is also a powerful tool that you can use to guide each and every action you take in your business.

Use the space below to craft a mission statement that answers each of the following questions:

1. What do we do?
2. Why do we do it?
3. For whom do we do it?

Core Values

Core values are defined as a small set of timeless guiding principles for your company that inform all the decisions and create the company culture.

Here are some examples of common core values that we see in successful businesses:

- | | | |
|------------------|----------------|--------------------|
| • Accountability | • Spirituality | • Helping Others |
| • Inspiration | • Diversity | • Love What You Do |
| • Fame | • Education | • Teamwork |
| • Collaboration | • Family | • Charity |
| • Scholarship | • Recognition | • Innovation |





Now it's time for you to start mapping out your own core values for your jewelry business.

Start by listing 10-20 values, beliefs, feelings, ideas or things that are really important to you.

Next, pick your top five values from the list above and write them out.

Finally, for each of the 5 core values you've chosen, list how you'll implement each value in your business.

For example: Scholarship

Partnering with local schools throughout the year

Giving away 30% of total sales for the year in scholarships to students

Offer training to high school students interested in jewelry design





Reflection

Block out a few hours and honestly answer these questions.

Did you meet your goals for the past year? Why or why not?

Did you grow your client base as much as you wanted to? If so, keep up the great work! If not, take a look at what your marketing efforts were, and what you can change?





Did you make your financial goals? If so, ask yourself how you can continue to grow. If not, why? Did you spend too much? Do you have too much inventory that's not selling (or not enough to fill orders)?

Are you growing a customer base? Are your current clients coming back for repeat orders? Are your current clients coming back for repeat orders?

What other parts of the business do you want to evaluate?





Evaluation

Before you can start setting concrete, smart goals for 2017, you absolutely have to know what your 2016 looked like.

This section will take some time and some work, but it's so important to know your numbers if you're going to grow your business.

List out your 2016 sales numbers below:

2016 Annual Sales _____

Quarterly Sales:

Q1 _____

Q2 _____

Q3 _____

Q4 _____





Monthly Sales

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

Awesome job!



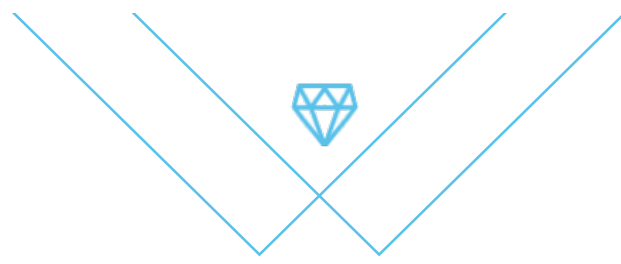


Now let's figure out what your top 3 revenue streams were in 2016. Fill in the table below. If you didn't participate in certain Revenue Generating Activities, leave that row blank.

| Revenue Generating Activity | Gross Income | % of Annual Sales | Energy put into growth (high, medium, low) | Excitement Level (1-10) *10 is most excited |
|------------------------------------|---------------------|--------------------------|---|--|
| Wholesale Stores | | | | |
| Retail Store | | | | |
| Website | | | | |
| Etsy or 3rd Party Site | | | | |
| Trunk Shows | | | | |
| Live Events | | | | |
| Craft Fairs | | | | |
| Home Parties | | | | |
| Trade Shows | | | | |
| Other Direct to Consumer | | | | |
| Private Clients | | | | |
| Custom Work | | | | |
| One-of-a-Kind | | | | |
| Private Label | | | | |
| Affiliate or Partner Referrals | | | | |

Using the table you just filled out, list your top three 2016 revenue sources. Base your determination on the percentage of annual sales each RGA accounted for, with consideration to the level of energy and excitement you have for it.





You're almost done!

For our final step, list out any new sales ideas or revenue streams that you'd like to try in 2017. Don't hold back!

We're super proud of you laying out your 2016 numbers. Now that you have a foundation to build on, let's start planning for your DREAM business in 2017.

SECTION 2 THE FRAMEWORK FOR YOUR DREAM YEAR: INTENTION AND GOAL SETTING

Let's just lay it out there... goal setting for a whole year seems overwhelming. That's because it is. In this section, we are going to walk you through how to set goals that you can wrap your head around and start moving toward today.

Let's start with the 20,000 foot view of the coming year.

Your Word for the Year

Pick one word that will define your business and lifestyle in 2017. Tracy's 2016 word was support. Having that one word as a guide led to joining a Mastermind and attending networking events that she would have skipped any other year. But those connections have led to a network of support that has brought on amazing growth in business. So...what's your one word?





Your Intention for The Year

What is your intention for 2017? It seems like such a simple question, but have you really given it some thought?

Write out your intention for the coming year.

- **Example #1:** My #1 intention is to surround myself with people and circumstances that are in alignment with my vision and will help me feel supported in my life and my business.
- **Example #2:** My intention for 2017 is to build a business where I earn a full-time income and still arrive home by 3 pm to take care of my children.
- **Example #3:** My intention is to develop eco-friendly partnerships that align with my company's mission for social responsibility, and will accomplish my desire to build one of the premier eco-luxury jewelry brands.

Okay, now that you're warmed up, let's talk about setting your goals.

You must find a way to make your goals measurable and actionable.

Here are a few examples:

Measurable/Actionable Goal: Increase my wholesale accounts by 2 stores a month by spending 3 hours a week reaching out to new stores and servicing my existing accounts.

- If you gain 2 stores a month you will achieve this goal.
- If you spend 3 hours a week reaching out to new stores, you will know you put forth effort.





Immeasurable/Inactionable Goal: Increase my wholesale accounts by 2 stores a month.

- This is the most common goal we see. There's a goal, but no action tied to it. At the end of the year, if you do not achieve this goal...how will you know what went wrong?

Immeasurable/Inactionable Goal: Increase my wholesale business.

- How will you know if you achieved this goal?
- How will you put forth effort?
- Increase business is one of the most popular goals, but there's no way to tell if or how someone reached it. Results are different than goals.

Here are some basic guidelines for writing goals:

1. Goal statements should start with an action verb.
2. Each goal should have a measure which states how much is necessary to achieve this goal.
 - a. Use numbers, percentages, dollars or time
3. Your goals each need a target date which states when it will be achieved.



List out your measurable and actionable goals for 2017.

QUARTERLY ROCKS

We've found it best to laser focus on 3 major projects every 90 days or so. Sales, marketing, and collection development can all fall into this.

In his book Traction, Gino Wickman calls these Quarterly Rocks.

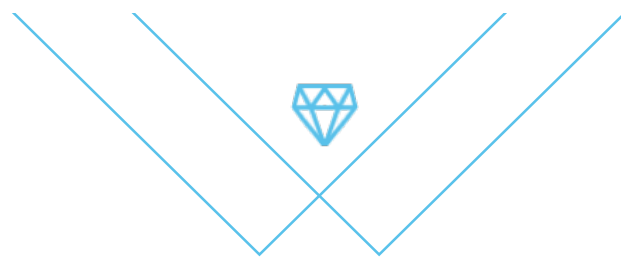
Your 3 Quarterly Rocks need to support the main goals you listed in the section above. If you can meet all of your quarterly rocks every 3 months, you'll find yourself checking off all of your overall goals next December!

List out your Q1 Rocks below that will support the yearly goals you've set for your business.

First Quarter 2017

Quarterly Rock #1





Quarterly Rock #2

Quarterly Rock #3





SECTION 3 MAKING THAT DREAM A REALITY: PLANNING

We're finally ready! It's time to start plugging numbers in for 2017 sales.

Fill in the table below with your own sales projections.

| | 2017 Sales Projection/Goal |
|------------------------|----------------------------|
| Quarter 1 | |
| January | |
| February | |
| March | |
| Quarter 1 Total | |
| Quarter 2 | |
| April | |
| May | |
| June | |
| Quarter 2 Total | |
| Quarter 3 | |
| July | |
| August | |
| September | |
| Quarter 3 Total | |
| Quarter 4 | |
| October | |
| November | |
| December | |
| Quarter 4 Total | |

Add up the totals for each of your 4 Quarters, which will equal your 2017 sales goal. Write it on the line below.

2017 Total Sales Goal _____





Next we're going to start at the highest level and work backwards to see how you'll reach your 2017 total sales goal.

1. Start by getting out 4 sheets of blank paper. Label them each with Q1, Q2, Q3 or Q4.
2. Write your sales goal for that quarter at the top of each page.
3. Write down your Revenue Generating Activities (RGAs) for each quarter. RGAs can be anything from wholesale accounts, to craft fairs to website promos, etc.. Be specific.

Here are a few of the common RGAs we often see in a jewelry biz:

Website Sales
Wholesale Account Sales
Brick and Mortar Store Sales
Trunk Shows/Events Sales
Trade Shows Sales
Direct to Consumer Sales

4. Next to each RGA write down your sales goal for that activity.
5. Total the sales from each activity.
6. When you're done, your expected sales from the activities written on the page should equal your sales goal for that quarter.

It's so much easier to track if you're on target and if you know that you're meeting (or not meeting) your RGA and quarter goals.

Example: Quarter 1

| Revenue Generating Activity | Sales Goal |
|------------------------------------|-------------------|
| New Year's Day Craft Fair | \$1000 |
| Valentine's Day website promo | \$4000 |
| Trunk Show at Debbie's home | \$500 |
| Wholesale Account - Bliss Boutique | \$2000 |
| Quarter 1 Sales Total | \$7500 |

Now it's your turn! Fill in the blanks below to create a literal roadmap for how you'll meet your 2017 sales goal.

2016 Sales Actual:: _____





2017 Annual Sales Goal:: _____

Quarter 1

Revenue Generating Activities

Sales Goal

Quarter 1 Sales Total

Quarter 2

Revenue Generating Activities

Sales Goal

Quarter 2 Sales Total





Quarter 3

Revenue Generating Activities

Sales Goal

Quarter 3 Sales Total

Quarter 4

Revenue Generating Activities

Sales Goal

Quarter 4 Sales Total

Total your 4 Quarterly Sales Totals:

Does your total match the 2017 Annual Sales Goal you listed above?
If not, go back and make adjustments as needed.





Sales Strategies and Tactics

If you're new to business and not sure how you'd even go about bringing in sales, refer to this list of common strategies and tactics that are often used successfully.

- Reduce Inventory
- Segment Your Email List
- Team Up With Businesses in Your Niche
- Upsell or Suggestive Sell
- Cross Sell
- Connect with Bloggers, Influencers and Instagrammers
- Get Featured on a Podcast
- Write a Guest Post for a Blog
- Communicate Your Story
- Ramp Up Your Social Media Presence

ACTION PLAN

The most important component to your success. If you have big goals, you need to give yourself daily and weekly action steps to get there. It's so frustrating having goals with no ideas on how to make them happen. You end up spinning your wheels and going in circles.

The best way is the "simple-steps" method using time-blocking. At the core, you reach your goals by taking super achievable steps. As always, the magic number here is 3!

It's unrealistic to expect to complete more than three significant tasks per day. You have a certain amount of energy, and if you spread yourself too thin your results won't be great. Also, if you're not giving yourself enough to do you run the risk of over thinking things or simply slacking off.

For solo-jewelry designers and makers, one of the best ways to stay focused is to Time Block the most important tasks for the day. Be careful not to allocate too much time to Revenue Generating Activities on one single day. Whenever you have to rely on people getting back to you, it's best to split that up in smaller chunks on multiple days.





Here's a weekly breakdown that works for us:

- Mondays and Wednesdays become your sales days
- Tuesday and Thursdays become your marketing days
- Fridays become your Collection Development days

Start with general tasks, then work your way down to time blocking.

You can use a weekly plan template like the one below to help you organize your week.

Week Date Range: _____

Weekly Sales Target: _____

Weekly Goals (tie them into your 3 Quarterly Rocks)

Daily Priorities

Monday Priorities





Tuesday Priorities

Wednesday Priorities

Thursday Priorities

Friday Priorities

So there you have it! It is that simple, but we know it is not always easy. However, by following the steps in this workbook, you will be a goal setting rock star!

Go forth and plan!

