



Strategic Planning *intensive*



THE
UNSTOPPABLE
woman
WITH AMIRA ALVAREZ



agenda

Preparation: Pages 1-6

Day 1: Pages 7-14

Day 2: Pages 15-34

Day 3: Pages 35-48

Day 4: Pages 49-54

Day 5: Pages 55-122



contents

Checklist for Awesome	3
What to Expect	4
Praise and Appraise	6
The Truth of Where You're At	9
Business Focus Scorecard	11
Personal Life Scorecard	13
The Scale Plan	15
Simple Marketing Plan	55
Simple Sales Plan	75
The Delegate-to-Done Framework	82
Personal Life Plan	94



Checklist for *awesome*

How to get the most out of the Strategic Planning Intensive

- ☐ Print or download this workbook
- ☐ Grab previous workbook if you've done a Strategic Planning Intensive before
- ☐ Get all the calls on your calendar
- ☐ Turn on your video during the calls
- ☐ Add work time to watch the videos on your calendar
- ☐ Watch the videos
- ☐ Do the exercises
- ☐ Grab your post-it notes (*yes, you'll need them!*)

let's go!



What to *expect*

We're going to identify one move-the-needle activity that you'll get done in the next 90 days that will increase cashflow, ease, and happiness in your business.

We'll identify one overarching business goal and the projects that make up achieving that goal, and the tasks that make up those projects—all in a strategically ordered fashion so that you always know what you do next and can tick those steps off one at a time. Plus, we'll look at what you want in your personal life as well!

We're also setting you up for ongoing success by helping you integrate this into other tools like the Creation playbook, your 30/60/90-day goals, as well as mapping out the beliefs and habits required for success.



NOTE *training videos*

Will be sent to you the evening before each day

Praise and Appraise

- 1 **The last 90-days:** Write down your wins and lessons that upleveled your life.

Praise and Appraise

2 **The last six months:** Write down your wins and lessons that upleveled your life.

Praise and Appraise

3

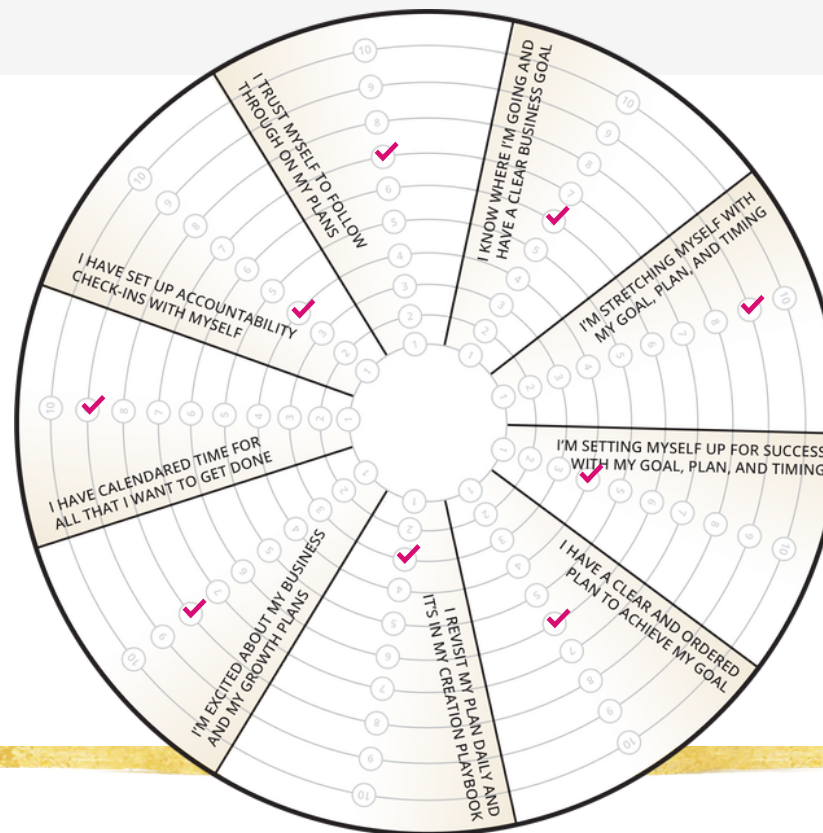
The last year: Write down your wins and lessons that upleveled your life.

The Truth of Where You're At

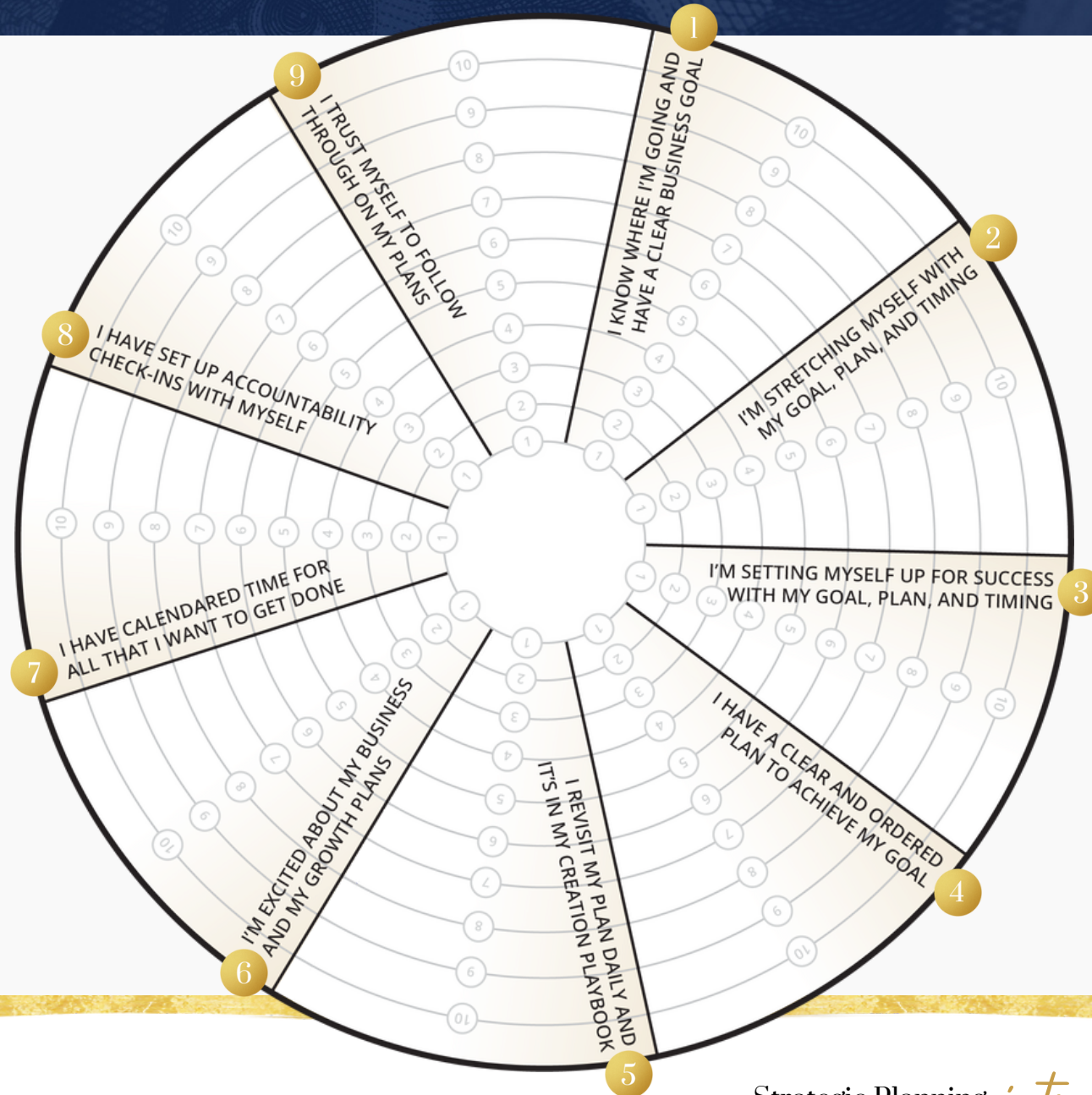
"The degree to which a person can grow is in direct proportion to the amount of truth that he can accept about himself without running away."

LELAND VAL VAN DE WALL

Work through each area of The Unstoppable Assessment to mark off where you feel you land for each, with 1 being the lowest or a "no," and 10 being the highest or a "yes." You can either draw a dot on the corresponding line for each, or color in those sections of the wheel to get a sense of where you're at.



The Truth of Where You're At



The Strategy Assessment Tool: Business Focus Scorecard

For each category, you're going to assess if it's a problem, weakness, strength, or superpower. Circle the star (or click to change its color on the PDF) that represents where you're at—no judgment! This is important information.

Lead Generation:

Marketing, bringing new leads into your sphere.

Lead Nurture:

Nurturing the people in your world, building know/like/trust, warming them up, but they haven't taken next step to have a conversation or buy an offering.

Conversion:

Converting leads into customers and clients through sales conversations or automated funnels.

Delivery: How you deliver your product or service to your clients.

Operations: Systems and flows so things operate smoothly, HR, technology, hiring, delegating, and team management.

Business Model: How your products and services work together.

Retention: Keeping existing clients and having them continue to work with you.

Ascension: Your existing clients move up and go to the next level in your business model.

	LEAD GENERATION	LEAD NURTURE	CONVERSION (SALES)	DELIVERY/OPS/ BUSINESS MODEL	RETENTION/ ASCENSION
SUPERPOWER					
STRENGTH					
WEAKNESS					
PROBLEM					

The Strategy Assessment Tool: Business Focus Scorecard

	LEAD GENERATION	LEAD NURTURE	CONVERSION (SALES)	DELIVERY/OPS/ BUSINESS MODEL	RETENTION/ ASCENSION
SUPERPOWER	★	★	★	★	★
STRENGTH	★	★	★	★	★
WEAKNESS	★	★	★	★	★
PROBLEM	★	★	★	★	★

The Strategy Assessment Tool: Life Focus Scorecard

For each category, you're going to assess if it's a problem, weakness, strength, or superpower. Circle the star (or click to change its color on the PDF) that represents where you're at—no judgment! This is important information.

Relationships:

Family, friends, colleagues, mastermind sisters, team, business partners, primary love relationship.

How You Look:

Do you love how you look? Hair, clothing, skin, weight, style, etc.

How You Feel:





















Mental and emotional well-being, energy, enthusiasm, your rhythms.

Your Environment:

House, office, car, backyard, wherever you spend your time.

Fun Factor:

Is your life lit up? Are you living your best life and making the impact you want?

	RELATIONSHIPS	HOW YOU LOOK	HOW YOU FEEL	YOUR ENVIRONMENT	FUN FACTOR
SUPERPOWER					
STRENGTH					
WEAKNESS					
PROBLEM					

The Strategy Assessment Tool: Life Focus Scorecard

	RELATIONSHIPS	HOW YOU LOOK	HOW YOU FEEL	YOUR ENVIRONMENT	FUN FACTOR
SUPERPOWER	★	★	★	★	★
STRENGTH	★	★	★	★	★
WEAKNESS	★	★	★	★	★
PROBLEM	★	★	★	★	★

The Scale Plan



It's essential that you connect the 90-day goal you'll create to your bigger plan for the year. If you don't have a bigger plan, you need to create one first.

If you've never done The Scale Plan or worked with me for a while (or one-on-one) to create your big, juicy plan, you're going to start this process on step one.

If you've already mapped out your scale plan for the year and just need to review and update it, start this process on step 13.

Having a clear plan to scale is the first step to getting you to your 6-figures, 7-figures, or beyond... without starting another thing you don't finish, without losing trust in yourself, without ignoring your family, and especially without taking on one more thing that puts you over the edge and into burnout.

If you've done The Scale Plan before, grab that previous copy before digging in.

The Scale Plan

1 What is your income goal for this year?

\$

2 Is your income goal an exciting stretch goal? Yes/No? Please explain.

A stretch goal should excite you and make you wonder "How the heck is that going to happen?" or "Who am I to want so much?" Did that happen for you?

If your answer was no, go back and choose an exciting stretch goal. Your success depends upon it.

The Scale Plan

3

What gets to happen for you if you achieve your stretch goal within the next 12 months?

Asked another way, what's the real, positive consequence of this goal? Why do you really want it?

The Scale Plan

4 What happens if you don't achieve your goal?

*Asked another way, what's the real, negative consequence of not achieving this goal? (**Hint:** If there's nothing at stake, if it's fine to not achieve it, you don't want it badly enough to make a real income breakthrough.) Really dig deep here and recognize what's at stake if you don't follow through with what you want for yourself.*

The Scale Plan

5 On a scale of 1-10 how important is it to achieve your goal?

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

6 On a scale of 1-10 how committed are you to achieving it?

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

7 What are your product or service offerings?

	Sold for	\$
	Sold for	\$
	Sold for	\$
	Sold for	\$
	Sold for	\$

The Scale Plan

8

Can you scale to the level you want with your current offerings at their current price point without being overworked, overwhelmed, or burnt out? Yes/No? Please explain.

*Use our easy math spreadsheet on the following page to **"Make Love to the Numbers"** and evaluate if scaling with your current offerings, pricing, and time is mathematically possible (You can [click here](#) for an automated Google Sheet.)*

The Scale Plan

Make Love to the Numbers

Example #1

Your Income Goal:		\$100,000							
Product/Service Offering	Sells For	Quantity Monthly	Quantity Annually	Plan	Hours Required Individually	Hours Required Total Monthly	Hours Extended Month 2	Hours Extended Month 3	
Course	\$297	6	72	\$21,384	0	0	0	0	
3 month group program	\$1,500	2	24	\$36,000	0	0	0	0	
1 year private client	\$8,000	0.5	6	\$48,000	4	2	4	6	
Total				\$105,384		2	4	6	
Weekly Hours						0	1	1	

The Scale Plan

Make Love to the Numbers

Example #2

Your Income Goal:		\$1,000,000						
Product/Service Offering	Sells For	Quantity Monthly	Quantity Annually	Plan	Hours Required Individually	Hours Required Total Monthly	Hours Extended Month 2	Hours Extended Month 3
Small project < \$500k	\$20,000	1	12	\$240,000	0	12	24	24
Med project > \$500k < \$1M	\$40,000	3	36	\$1,440,000	4	12	24	36
Large project > \$1M	\$100,000	0.25	3	\$300,000	10	2.5	20	30
Total				\$1,980,000		26.5	68	90
Weekly Hours						6	16	21

The Scale Plan

Make Love to the Numbers

Your Income Goal:

\$

Product/Service Offering	Sells For	Quantity Monthly	Quantity Annually	Plan	Hours Required Individually	Hours Required Total Monthly	Hours Extended Month 2	Hours Extended Month 3
Total								
Weekly Hours								

The Scale Plan

9

How are you going to make more money?

Making more money isn't complicated. There are only three ways to make more money:

1. Raise your prices
2. Sell more of your existing products or services (increase quantity)
3. Add a new channel of income

What of these ways and what about them are calling to you? Which one of these or combination of them will you do?

The Scale Plan

10 Now be specific. I will increase my revenue by:

Raising my prices to \$

Increasing the quantity of what I'm already selling by

Adding this new channel of income:

11 Do you reach your income goal in the next 12 months?

Yes/No? Please explain. Use the "Make Love to the Numbers" spreadsheet again. Do the math with your chosen path to increasing your revenue to make sure it's a viable plan.

Don't continue until you've answered 'Yes' to this question. You must adjust your plan until you get a 'Yes' by raising your prices, increasing quantity/selling more, or adding another channel of income.

The Scale Plan

- 12** If you have a service based business check your plan. Will your new plan cause you to be working too many hours? Yes/No? Please explain.

*Don't continue until you've answered '**No**' to this question. You must adjust your plan by raising your prices or adding another channel of income that's more leveraged so that you can reduce the quantity of time you are spending executing on your contracts. Otherwise, you're setting yourself up for failure and disappointment.*

- 13** What are the steps you already know you need to take to put this plan in place?

Don't worry about the order, just get them all down on post-it notes on the following.
What would you need to do to make this happen?

The Scale Plan

Drop your post-it notes here, don't worry about the order!

The Scale Plan

Drop your post-it notes here, don't worry about the order!

The Scale Plan

Drop your post-it notes here, don't worry about the order!

The Scale Plan

14 Now, take all your post-it ideas and put them in chronological order.

Don't get too caught up in this. Take your best shot at what comes first, then second, then third.

Phase 1:

--	--	--	--	--

Phase 2:

--	--	--	--	--

The Scale Plan

Phase 3:

--	--	--	--	--

Phase 4:

--	--	--	--	--

Phase 5:

--	--	--	--	--

The Scale Plan

Phase 6:

--	--	--	--	--

Phase 7:

--	--	--	--	--

Phase 8:

--	--	--	--	--

The Scale Plan

Phase 9:

--	--	--	--	--

Phase 10:

--	--	--	--	--

Phase 11:

--	--	--	--	--

The Scale Plan

Phase 12:

--	--	--	--	--

Phase 13:

--	--	--	--	--

*Woohoo!! You've now got an ordered plan to get you to your income goal!!
Next up, we need to look at what might stop you from running with this.*

The Scale Plan

15 Reviewing each of the steps above, is there anything that is stopping you from taking each of those steps?

What's potentially going to get in your own way and stop you? *For instance, if one of your steps is going live on Facebook or Instagram and you've never done that, knowing how to do that may stop you, at least temporarily.*

Review each step and think about what might get in your own way.

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

16 What is stopping you or potentially could stop you from executing on the plan more generally?

List out all the challenges. *(Think in terms of marketing, sales, operations or systems knowledge, team and support, available time, family, experience, confidence, fear, and mindset.)*

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

The Scale Plan

17 What action could you take to solve that challenge? What are your solutions to each challenge?

Come up with three potential solutions for each challenge.

Stopper:	Solution 1:	Solution 2:	Solution 3:
Stopper:	Solution 1:	Solution 2:	Solution 3:
Stopper:	Solution 1:	Solution 2:	Solution 3:

The Scale Plan

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

The Scale Plan

Stopper:	Solution 1:	Solution 2:	Solution 3:
Stopper:	Solution 1:	Solution 2:	Solution 3:
Stopper:	Solution 1:	Solution 2:	Solution 3:
Stopper:	Solution 1:	Solution 2:	Solution 3:

The Scale Plan

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

The Scale Plan

18 Who are three people in business, dead or alive, who you admire?

1.

2.

3.

19 Now use your imagination. **How would these three people approach your challenges? What advice would they give you?**

How would they approach your challenges? What would be their advice to you?

Person 1:

1.

4.

2.

5.

3.

6.

The Scale Plan

Person 2:

1.	4.
2.	5.
3.	6.

Person 3:

1.	4.
2.	5.
3.	6.

The Scale Plan

20

Now take a look at all your ideas and solutions. You're a creative powerhouse! Woohoo!
Now, who do you need to be to get into action and execute on these steps and solutions?

I would need to be someone who...

The Scale Plan

I would need to adopt these beliefs...

A large, empty rectangular box with a thin gray border, intended for the user to write down beliefs they need to adopt.

The Scale Plan

I would need to adopt these success habits...



The Scale Plan

21 Now set your 30 / 60 / 90 day goals.

Drop each step into the appropriate column and check it off when it's in your Creation Playbook.

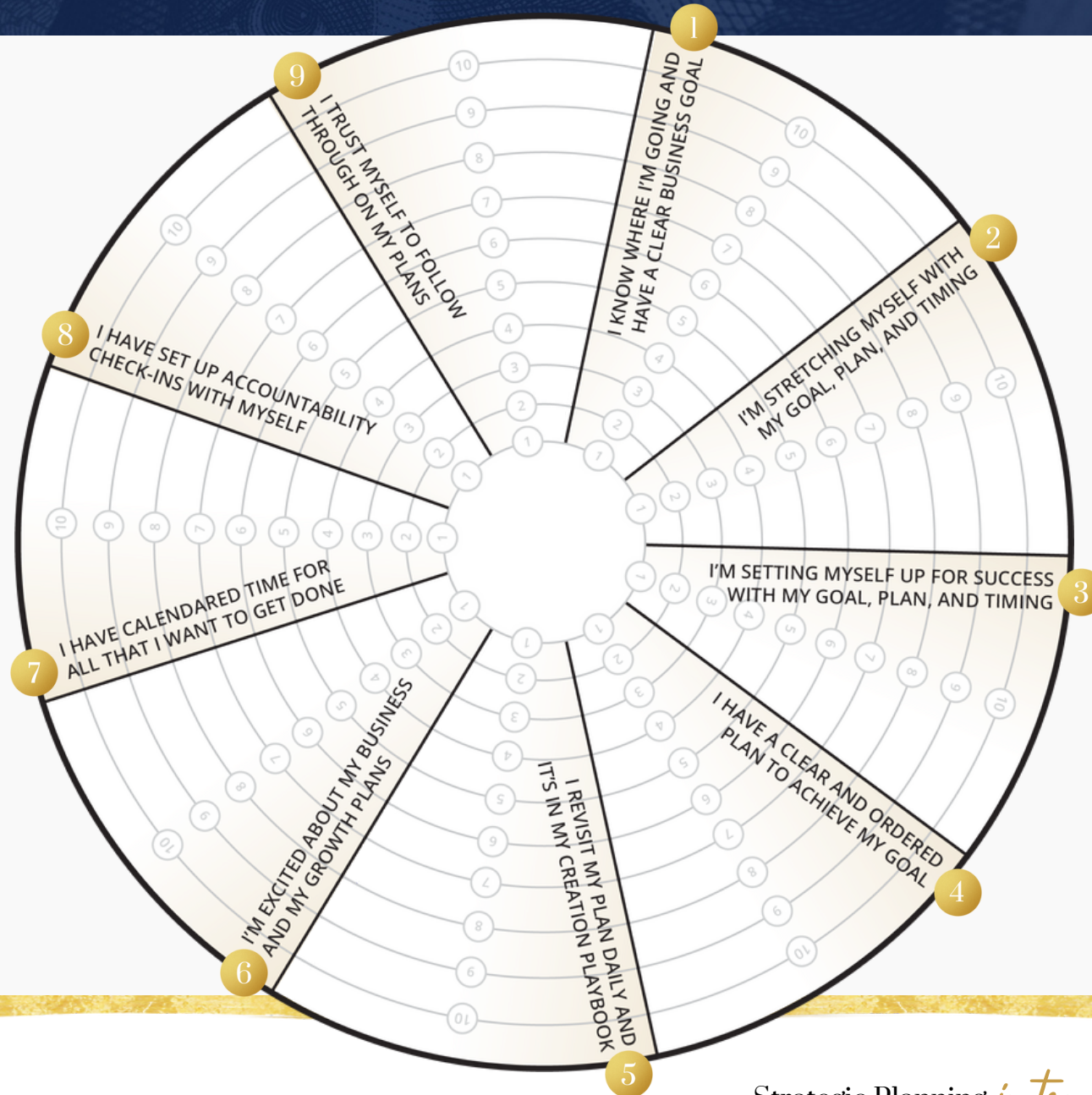
The Scale Plan



Check Your Work:

- | | |
|--|--|
| <input type="checkbox"/> Income Goal | <input type="checkbox"/> Check Your Hours |
| <input type="checkbox"/> Stretch Goal | <input type="checkbox"/> Brainstorm Your Steps |
| <input type="checkbox"/> What Gets to Happen | <input type="checkbox"/> Put Them in Order |
| <input type="checkbox"/> What Happens if You Don't | <input type="checkbox"/> What's Stopping You |
| <input type="checkbox"/> Rate its Importance | <input type="checkbox"/> List Your Challenges |
| <input type="checkbox"/> How Committed Are You | <input type="checkbox"/> Actions to Solve Your Challenges |
| <input type="checkbox"/> Products and Services | <input type="checkbox"/> Three People You Admire |
| <input type="checkbox"/> Scale Without Burnout | <input type="checkbox"/> Three People's Advice |
| <input type="checkbox"/> Three Ways to Make More Money | <input type="checkbox"/> Who You Need to Be |
| <input type="checkbox"/> How You'll Increase Revenue | <input type="checkbox"/> Set Your Goals |
| <input type="checkbox"/> Reaching Your Income Goal | <input type="checkbox"/> Add Your Beliefs, Habits, and Goals to Your Creation Playbook |

The Truth of Where You're At



Creating a Simple Marketing Plan



We're going to use this process to create a simple marketing plan that you can add to as you go. You'll want to stack your marketing efforts, rather than try to do everything immediately.

In business, marketing is essential. It brings you more clients, more cash, more recognition, and ultimately, more overall success. But I'm not advocating for any old marketing. You have to do marketing *your way*. I firmly believe this. Yes, you need to know basic and essential marketing concepts and what your options are. (I'll help you with that.) But beyond that, you need to figure out exactly how to market in a way that feels aligned and good to *you*, and that's exactly what this simple marketing plan process will help you do.

Creating a Simple Marketing Plan

1 **Who is your ideal customer?** Think psychographics and demographics.

PSYCHOGRAPHICS

DEMOGRAPHICS

Creating a Simple Marketing Plan

2

Where do they hang out?

SOCIAL MEDIA PLATFORMS

HOW THEY SPEND THEIR FREE TIME / HOBBIES

CLUBS / GROUPS / ASSOCIATIONS

MAGAZINES / WEBSITES

Creating a Simple Marketing Plan

3

What are you an expert in? List 3-5 topics.

Creating a Simple Marketing Plan

4

How do you like to communicate?

Check off your favorites and then re-order them based on what you like most to least.

- ☐ Live video
- ☐ Pre-recorded video
- ☐ Audio/podcast
- ☐ Social media
- ☐ Blog
- ☐ Newsletter
- ☐ One-on-one
- ☐ One-to-many
- ☐ In-person events
- ☐ Virtual events
- ☐ Networking events
- ☐ Social events
- ☐ Speaking

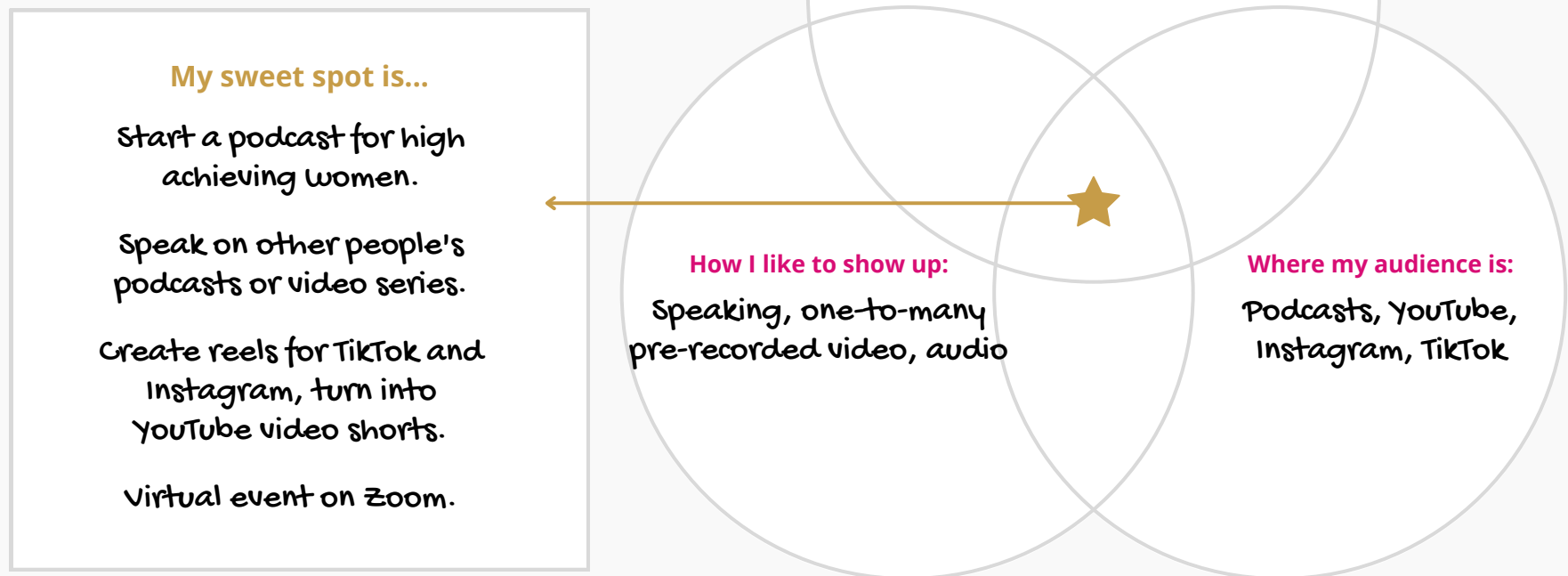
- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.

Creating a Simple Marketing Plan

5 Triangulate the answers to the 3 previous questions.

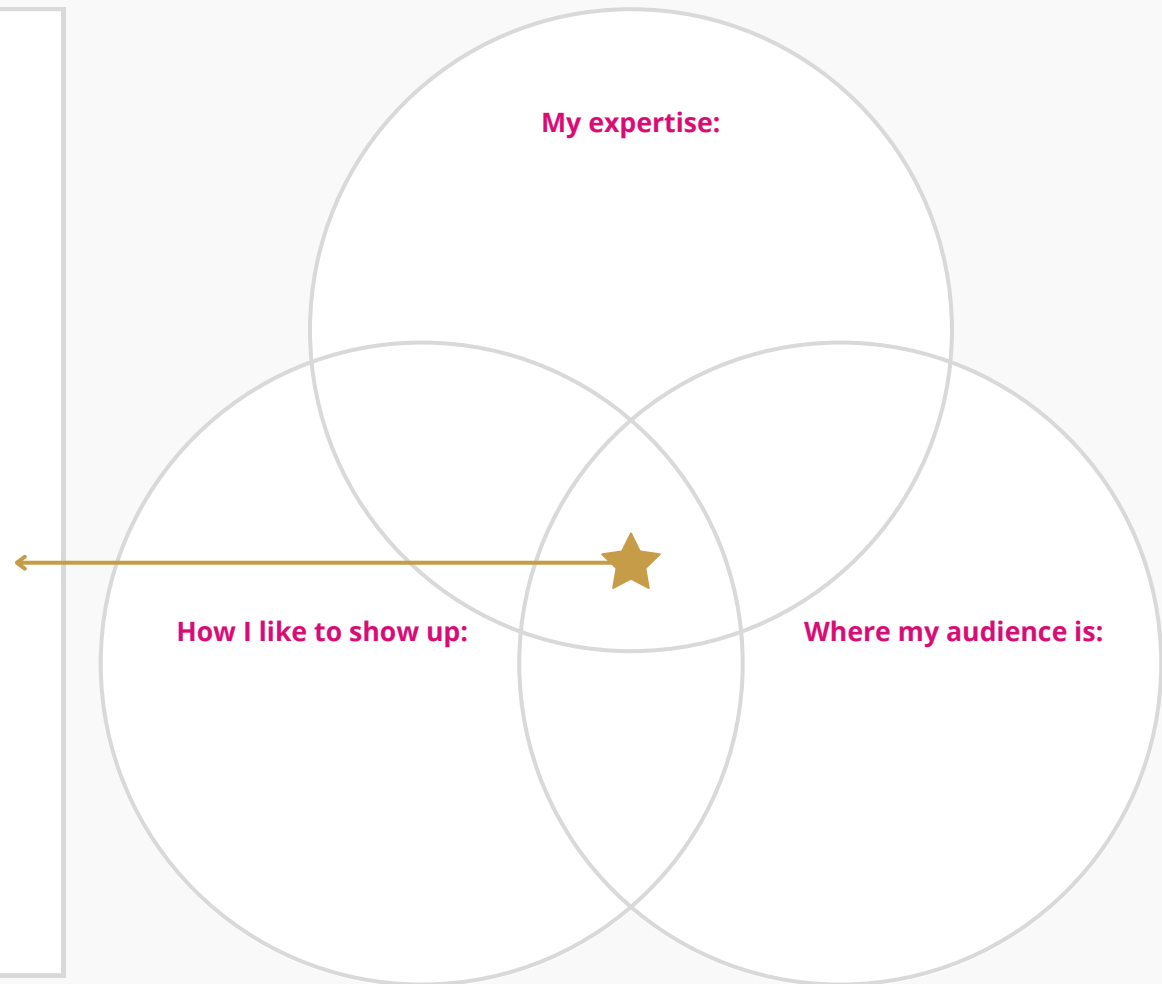
How can you show up as an expert where your customer hangs out in a way that you like to communicate? How will you offer value and teach on your expertise?

Here's an example, fill yours out on the following page.



Creating a Simple Marketing Plan

My sweet spot is...



Creating a Simple Marketing Plan

6

Build a plan around this. Using post-it notes, brainstorm all the tasks for each category.

SYSTEMS

*Drop your post-it notes here,
don't worry about the order!*

TECHNOLOGY

*Drop your post-it notes here,
don't worry about the order!*

Creating a Simple Marketing Plan

RESEARCH

*Drop your post-it notes here,
don't worry about the order!*

PREPARATION

*Drop your post-it notes here,
don't worry about the order!*

Creating a Simple Marketing Plan

TEAM / SUPPORT

*Drop your post-it notes here,
don't worry about the order!*

OTHER

*Drop your post-it notes here,
don't worry about the order!*

Creating a Simple Marketing Plan

7 Now, take all your post-it ideas and put them in chronological order.

Don't get too caught up in this. Take your best shot at what comes first, then second, then third.

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15

Creating a Simple Marketing Plan

16	17	18	19	20
21	22	23	24	25
26	27	28	29	30

Creating a Simple Marketing Plan

8 For each task/project, what does done look like?

Define your success criteria. Use the “6 Components For Effectively Delegating a Project” whether you are delegating to yourself or someone else. *Use your discernment on what requires this level of break-down.*

Project:

Visionary (the **Make it Up** person):

Owner (the **owner** person):

Operator (the **Make it Real** person/people):

Additional team:

Creating a Simple Marketing Plan

Project:

Visionary (the ***Make it Up*** person):

Owner (the ***owner*** person):

Operator (the ***Make it Real*** person/people):

Additional team:

Creating a Simple Marketing Plan

Project:

Visionary (the ***Make it Up*** person):

Owner (the ***owner*** person):

Operator (the ***Make it Real*** person/people):

Additional team:

Creating a Simple Marketing Plan

9 Decide on how you will make this recurring.

Consistency is key. You're going to want to get one marketing project going on a recurring basis, keeping your word to yourself, before you stack and add more things to your marketing.

10 Will you do one thing a day or “batch attack”?

11 What is your start date?

12 Create a marketing calendar.

Once the system is created, what's dropping at what time? Use the following pages to map it out.

Creating a Simple Marketing Plan

Creating a Simple Marketing Plan

Creating a Simple Marketing Plan

Creating a Simple Marketing Plan



Check Your Work:

- ☐ Ideal Customer
- ☐ Where They Hang Out
- ☐ Your Expertise
- ☐ How You Like to Communicate
- ☐ Find Your Sweet Spot
- ☐ Brainstorm Your Plan
- ☐ Order Your Tasks
- ☐ What Done Looks Like
- ☐ Make it Recurring
- ☐ Set Your Timing
- ☐ Pick a Start Date
- ☐ Create Your Marketing Calendar

A Simple Sales Plan



I built a 7-figure business on direct outreach. Although we want to create your marketing engine, there's nothing like personal touch to activate sales.

Without a doubt, learning sales and making it a priority practice was the critical tactical skillset that catapulted me from making \$138k to \$700k in one year, then reaching 7-figures and beyond without a huge list, speaking on stages, or running myself ragged. If you want to make an excellent living and serve your ideal clients, you must first learn to enroll them in your offerings! And that requires building relationships with referral partners and being in regular communication with your prospects.

A Simple Sales Plan

This checklist represents a simple sales plan to get you started.

Do each item in the order it is listed.

- ☐ **Set daily and/or weekly outreach metrics.**

DAILY METRICS

WEEKLY METRICS

- ☐ **Set weekly sales conversation metric:**

- ☐ **Start outreach and sales conversations even before you start or finish the following.**

action is a balm. Don't keep getting ready to get ready; start this process now!

- ☐ **Block off time in your calendar for outreach.**

A Simple Sales Plan

- ☐ **Write a list of 100 people you know.** *Everyone you know is either a potential customer or a potential referrer. Bonus points if you go to town and find 1,000 people. Put your list into a google sheet.*
 - ☐ I've gone through all my family members
 - ☐ I've gone through all the contacts in my phone
 - ☐ I've gone through all the contacts in my email
 - ☐ I've gone through all the subscribers on my email list
 - ☐ I've gone through all my Facebook friends
 - ☐ I've gone through all my LinkedIn connections
 - ☐ I've gone through all my Instagram followers
 - ☐ I've gone through all my Twitter followers
 - ☐ I've gone through all my TikTok followers
 - ☐ I've gone through all the social media groups I'm in
 - ☐ I've gone through all the connections in the associations I'm a part of
 - ☐ I've gone through all the members on the boards I sit on

A Simple Sales Plan

- ☐ I've gone through members in all the organization's I'm in
 - ☐ I've gone through members of all the clubs I'm in
 - ☐ I've gone through all my connections from church
 - ☐ I've gone through all my children's friend's parents
 - ☐ I've gone through my current client list
 - ☐ I've gone through my past client list
 - ☐ I've gone through my past employer list
 - ☐ I've gone through my past referrer list
 - ☐ I've gone through all my service provider contacts
-
- ☐ **Start reaching out to your list.** Yes, even before you start the sales training. Reach out to people every day to set up times to talk.
 - ☐ **Listen to sales training.** [Click here](#) to access it now.
 - ☐ **Customize your scripts.** Based on the sales training, create two scripts. One for your referral conversations and one for your sales conversations. Referrals are people who know others who might need your help.

A Simple Sales Plan

Referral Script

- ☐ **Connect:** ask questions about them.
- ☐ **Listen for what's going on in their life that may be something you can help them with.**

If so, ask a permission question like... “Hey I hear that you are going through xyz now. That’s one of my areas of specialty and what I help people with. Do you want some help with that? My perspective? I’m happy to talk with you about that and give you some next steps that might really help you.” If yes, this is now a sales conversation. Ask them the questions in the sales training around what they really want and what’s stopping them. This will help them so much. You can give a little perspective shifting advice here, however, you also must ask the next permission question... “You know this is just the tip of the iceberg, it sounds like you’d really like xyz. Do you want to talk about working together?”

- If yes, share your offer and ask for the sale.
- If no or not now, put on your follow up list.

(Continued)

A Simple Sales Plan

- ☐ If there's nothing going on for them that you can help them with, definitely share a person or other resource that could help them if you have that. (Giving is the First Law of Receiving.) Then you must segue the conversation to what you do and you must ask them if they know anyone who is looking to xyz (lose weight, works at a non-profit, has bought a new house, etc. This is the thing that your ideal client wants.)
- ☐ **Ask for the introduction.** Would you be willing to introduce us via a group email or text? Or would it be easier for you to give me their contact info and have me reach out to them directly?

Great! Can you do that now?

A Simple Sales Plan

- ☐ **Practice your script.** Practice asking for the sale out loud. Imagine objections and what you will say.
- ☐ **Set up an outreach and sales tracking system.**
Feel free to [use ours](#), create your own, or use a system like Pipedrive.
- ☐ **"The fortune is in the follow-up."** Create a follow-up plan. You can fine-tune this as you go but start by making some decisions and creating a plan.
 - ☐ When will you follow-up with referrals?
 - ☐ When will you follow-up with people who have yet to schedule a call?
 - ☐ When will you follow-up with people you've talked to?
 - ☐ What medium? (*Text, call, DM, email, letter, postcard, etc.*)
 - ☐ What is the cadence or frequency of the follow-up?
(*Every 3 days, every week, every 2 weeks, 6 weeks, month, quarterly, etc.*)
 - ☐ How will you remember to do this and how will you track this?
(*We recommend [our sales tracking sheet](#), Pipedrive, or using your own CRM.*)

The Delegate-to-Done Framework



The 6 components to delegating a project effectively to get the most out of yourself and your team (and save you hours of frustration).

All 6 of these components are about clarity. If you're not clear, you won't get what you want. It doesn't work to assume that the people on your Team can read your mind. Set them up for success and maximize your time, money, and human resources by getting clear. This process takes less than 10 minutes but will save you thousands of dollars and hours!

"Make it up. Make it Real. Make it Recurring."

DAN SULLIVAN

The Delegate-to-Done Framework

1 *I don't want this...*

The Problem: What's the problem you're solving with this project? Make sure everyone involved, but most importantly you, know what problem you're looking to solve by initiating this project.

Example: We don't know what success looks like with our FB ads, can't make good decisions on ad spend, poor visibility on what's happening and trends.

The Delegate-to-Done Framework

2 *I want this...*

The Outcome or Solution: What does the final result look like when this project or task is complete? What would you see, experience, have?

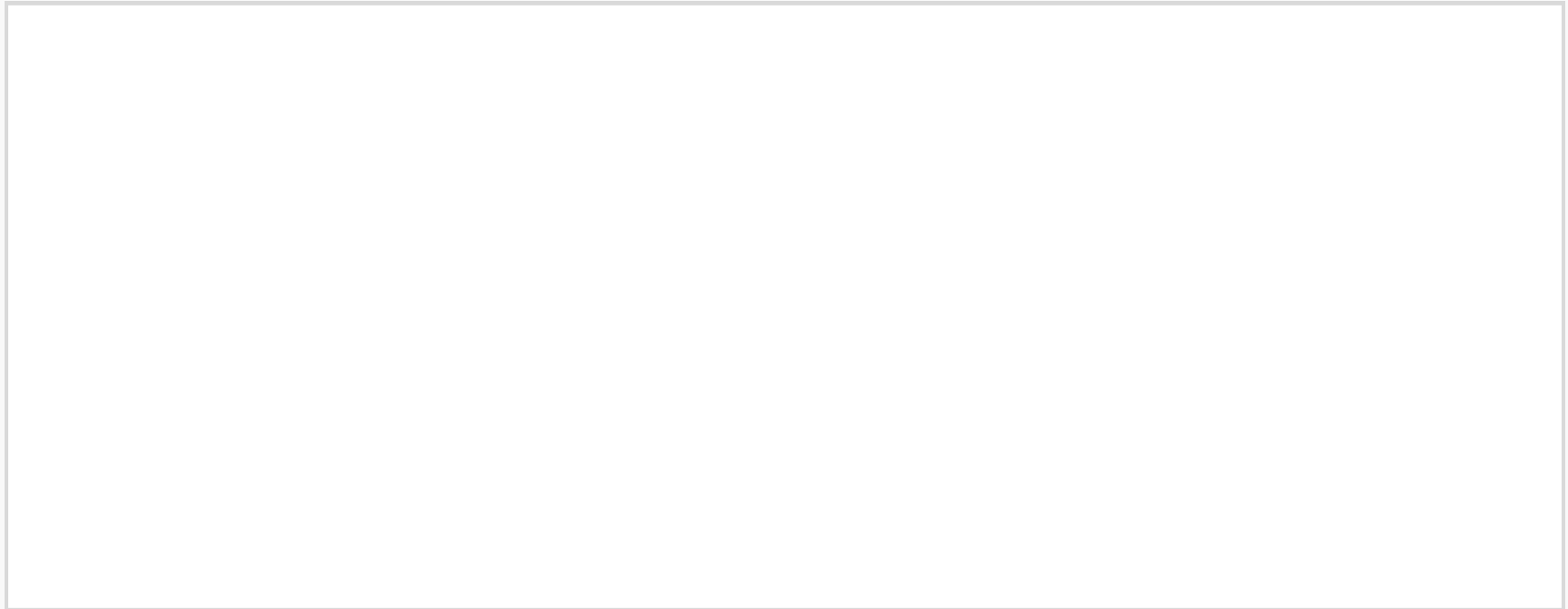
Example: Facebook ads structure and system has been created.

The Delegate-to-Done Framework

3 *aaaah, this gets to happen...*

The Impact: What's the impact this will make for you, your Team, the company?

Example: Efficiency, higher ROI, better conversions, growth of company and revenue, less wondering "what's happening?" more trust.



The Delegate-to-Done Framework

4

what done looks like...

The Success Criteria: This is where you define what 'done' looks like. What do you need to have happened for this project to be a success? You will usually 4-5 success criteria but sometimes it's more than that.

Example: Create snapshot page. It needs to be easy to visually assess where we are and include: last updated, what lead magnets/ad categories are running, key metrics (dials, color coding), total ad spend overall per ad category and overall (daily, weekly, monthly). Is there an existing app that does this so we don't have to recreate the wheel?

Success Criteria 1:

Success Criteria 2:

Success Criteria 3:

The Delegate-to-Done Framework

Success Criteria 4:

Success Criteria 5:

Success Criteria 6:

Success Criteria 7:

The Delegate-to-Done Framework

Success Criteria 8:

Success Criteria 9:

Success Criteria 10:

Success Criteria 11:

The Delegate-to-Done Framework

Success Criteria 12:

Success Criteria 13:

Success Criteria 14:

Success Criteria 15:

The Delegate-to-Done Framework

5 *aaaah, it's all being handled...*

Who Owns The Project: This is super simple. Who owns getting this project done?
More than one person may be working on it, but you need one owner.

Visionary (the **Make it Up** person):

Owner (the **owner** of the project):

Operator (the **Make it Real** person/people):

Additional team:

The Delegate-to-Done Framework

6 *woohoo, can't wait to see it done...*

Due Date: What's the due date for the final project to be complete?

If you want to avoid getting to the due date and having the project need your input for completion, set both a check-in date and a preliminary review date.

Check-in Date: The check-in date is mid-way through to see if they are on track. This may not be necessary with all projects or teams.

Preliminary Review Date: The preliminary review date is the date they show you the done project. Everyone needs to know that this date is to show you what they think done looks like not a work in progress. This allows you to give them feedback on small tweaks that are required.

The Delegate-to-Done Framework

Bonus Action:

Make it recurring!

Make one of your success criteria to make it recurring. In order for the project to be complete, the owner of the project would need to have created a workflow so that whatever you've set up can occur on a regular basis.

For example, if the project is to set up a photo management system, to make it recurring you'd need to implement a system for what to do with all new photos.

The Delegate-to-Done Framework



Check Your Work:

- ☐ The Problem
- ☐ The Outcome or Solution
- ☐ The Impact
- ☐ The Success Criteria
- ☐ Who Owns the Project
- ☐ The Due Dates

Personal Life Plan



Now we want to take a look at how your goals intertwine with your personal life, family, health, happiness, hobbies, and more!

The Scale Plan helps you create a strategic plan for your business and income, but what about your personal goals? If you want to be a truly unstoppable woman and create a next-level life that continually delights you, you need to be focused on the goals that get you there in addition to your business goals. This Personal Life Plan process will help you get clear on your top goals and how to make them happen rapidly!

Personal Life Plan

1 What are your top three personal goals for this year?

2 Are your goals an exciting stretch goal? Yes/No? Please explain.

A stretch goal should excite you and make you wonder "How the heck is that going to happen?" or "Who am I to want so much?" Did that happen for you?

If your answer was no, go back and choose an exciting stretch goal. Your success depends upon it.

Personal Life Plan

3

What gets to happen for you if you achieve your stretch goals within the next 12 months?

Asked another way, what's the real, positive consequence of this goal? Why do you really want it?

Personal Life Plan

4

What happens if you don't achieve your goals?

*Asked another way, what's the real, negative consequence of not achieving this goal? (**Hint:** If there's nothing at stake, if it's fine to not achieve it, you don't want it badly enough to make a real income breakthrough.) Really dig deep here and recognize what's at stake if you don't follow through with what you want for yourself.*

Personal Life Plan

5 On a scale of 1-10 how important is it to achieve your goals?

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

6 On a scale of 1-10 how committed are you to achieving them?

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

7 Can you scale to the level you want without changing anything else in your life? Yes/No? Please explain.

--

Personal Life Plan

8 How are you going to create more time?

9 What are the steps you already know you need to take to put this plan in place?

Don't worry about the order, just get them all down on post-it notes on the following.
What would you need to do to make this happen?

Personal Life Plan

Drop your post-it notes here, don't worry about the order!

Personal Life Plan

Drop your post-it notes here, don't worry about the order!

Personal Life Plan

Drop your post-it notes here, don't worry about the order!

Personal Life Plan

10

Now, take all your post-it ideas and put them in chronological order.

Don't get too caught up in this. Take your best shot at what comes first, then second, then third.

Phase 1:

--	--	--	--	--

Phase 2:

--	--	--	--	--

Personal Life Plan

Phase 3:

--	--	--	--	--

Phase 4:

--	--	--	--	--

Phase 5:

--	--	--	--	--

Personal Life Plan

Phase 6:

--	--	--	--	--

Phase 7:

--	--	--	--	--

Phase 8:

--	--	--	--	--

Personal Life Plan

Phase 9:

--	--	--	--	--

Phase 10:

--	--	--	--	--

Phase 11:

--	--	--	--	--

Personal Life Plan

Phase 12:

--	--	--	--	--

Phase 13:

--	--	--	--	--

*Woohoo!! You've now got an ordered plan to get you to your goal!!
Next up, we need to look at what might stop you from running with this.*

Personal Life Plan

11 Reviewing each of the steps above, is there anything that is stopping you from taking each of those steps?

What's potentially going to get in your own way and stop you? *For instance, if one of your steps is going live on Facebook or Instagram and you've never done that, knowing how to do that may stop you, at least temporarily.*

Review each step and think about what might get in your own way.

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Personal Life Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Personal Life Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Personal Life Plan

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Step:

Stopper:

Personal Life Plan

12 What action could you take to solve that challenge? What are your solutions to each challenge?

Come up with three potential solutions for each challenge.

Stopper:	Solution 1:	Solution 2:	Solution 3:
Stopper:	Solution 1:	Solution 2:	Solution 3:
Stopper:	Solution 1:	Solution 2:	Solution 3:

Personal Life Plan

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Personal Life Plan

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Personal Life Plan

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Stopper:

Solution 1:

Solution 2:

Solution 3:

Personal Life Plan

13 Who are three people, dead or alive, who you admire?

1.

2.

3.

14 Now use your imagination. **How would these three people approach your challenges? What advice would they give you?**

How would they approach your challenges? What would be their advice to you?

Person 1:

1.

4.

2.

5.

3.

6.

Personal Life Plan

Person 2:

1.	4.
2.	5.
3.	6.

Person 3:

1.	4.
2.	5.
3.	6.

Personal Life Plan

15

Now take a look at all your ideas and solutions. You're a creative powerhouse! Woohoo!
Now, who do you need to be to get into action and execute on these steps and solutions?

I would need to be someone who...

Personal Life Plan

I would need to adopt these beliefs...

Personal Life Plan

I would need to adopt these success habits...



Personal Life Plan

16 Now set your 30 / 60 / 90 day goals.

Drop each step into the appropriate column and check it off when it's in your Creation Playbook.

Personal Life Plan



Check Your Work:

- | | |
|--|---|
| <input type="checkbox"/> Personal Goal | <input type="checkbox"/> Put Them in Order |
| <input type="checkbox"/> Stretch Goal | <input type="checkbox"/> What's Stopping You |
| <input type="checkbox"/> What Gets to Happen | <input type="checkbox"/> List Your Challenges |
| <input type="checkbox"/> What Happens if You Don't | <input type="checkbox"/> Actions to Solve Your Challenges |
| <input type="checkbox"/> Rate its Importance | <input type="checkbox"/> Three People You Admire |
| <input type="checkbox"/> How Committed Are You | <input type="checkbox"/> Set Your Goals |
| <input type="checkbox"/> Growth Without Burnout | <input type="checkbox"/> Add Your Beliefs, Habits, and |
| <input type="checkbox"/> Creating More Time | Goals to Your Creation Playbook |
| <input type="checkbox"/> Brainstorm Your Steps | |

woohoo!

You have a strategic plan for exactly what you need right now!

Make sure to keep this and refer to it often.



THE
UNSTOPPABLE
woman
WITH AMIRA ALVAREZ