



## **PLAYBOOK STARTER GUIDE**

*CREATE GREAT PLAYS – RUN THE PLAYS*

## INTRODUCTION

Congratulations on taking a step toward creating your own personalized Playbook. This guide can help you get some clarity and direction so that you can begin to build positive momentum and gain control over your outcomes. I hope you find it useful!

In any endeavor, achieving your goals requires:

- 1) a solid plan
- 2) consistent execution

This Playbook Starter Guide contains simple exercises to help you reflect on where you are today, where you want to go, and how to bridge the gap. In other words, you'll begin to create a solid plan. I personally use variations of these exercises each quarter and I make the quarterly transition a major evaluation point for my professional and personal lives. Just a few hours per quarter dedicated to the exercises below can drastically alter the course of your business and life.

Inside, you'll find:

- A **self-assessment** to help you create a 30,000-foot view of your current situation.
- A **brainstorming session** that will generate ideas which you can use to improve your business and life.
- A **goal setting template** which will guide you through the process of setting clear goals that have specific outcomes and precise deadlines. [You can download the goal setting worksheet here.](#)
- A **time assessment** that will reveal how you spend your time so that you can be more intentional about how you choose to spend it. [You can download the time inventory worksheet here.](#)
- **3 Bonus Resources** you can immediately use to gain clarity and direction so that you begin to see and measure progress. (daily planner, SMART Goals,

Let's get started!

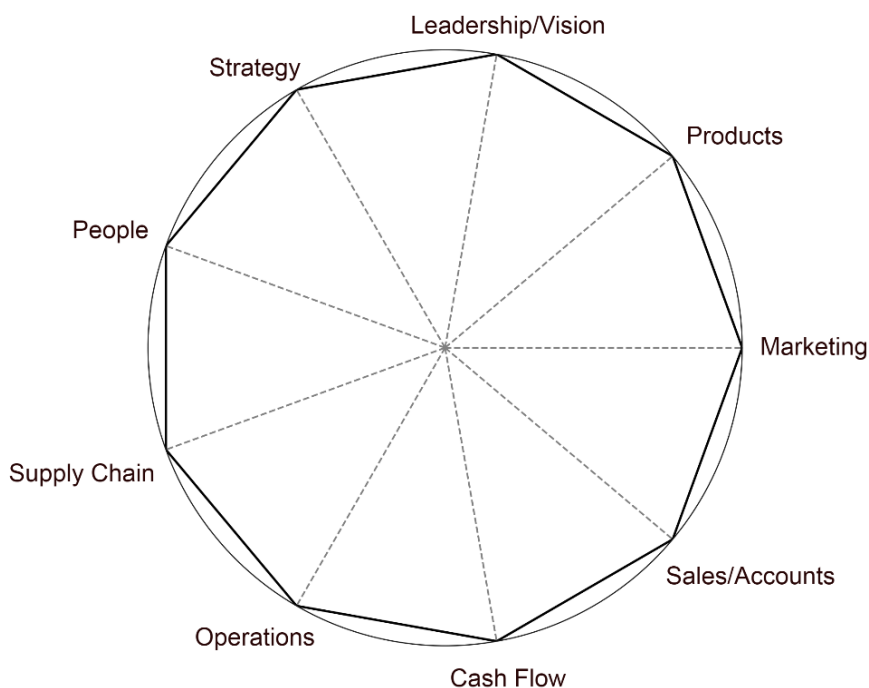
## SELF-ASSESSMENT

The “Wheel of Business” exercise is designed to help you understand the health of 9 areas of your business. You will end up with a high-level view of your business’ health you can use to triage your business.

If you are just launching a business, you might rate many areas low. Not a problem! The assessment will still help you prioritize and brainstorm next steps.

*Here's how it works:* Take time to reflect on each of these 9 areas of your business which are critically important to constantly improve. Think of them as spokes in a wheel. If the center of the circle represents 0% and the outside of the circle represents that you are 100% happy, how would you rate where are you currently in each area? (You can create other kinds of “Wheels” too, one for your personal life, your relationships, etc.)

Do not rush this process. Take time to reflect on each area. Honesty is key. An example of how to fill in the wheel is shown below the wheel. When you’re done rating each area, connect the points with a line and shade the middle to create a visual representation of the health of your business. Go ahead and fill in your wheel now.



***Fill it out like this:***



## GET SPECIFIC

Now that you have a general view of your business, take time to focus on each area separately and **think of three things you can work on to improve that area**. Don't worry about whether they are good or bad ideas, just write them down – you can always go back to improve or replace them. The idea is to get possibilities out of your head and down on paper so that you can work with them.

Then, for each area, **list one goal that you want to commit to over the next 6 months, followed by what you think is holding you back**.

For example, for Cash Flow you might come up with:

- 1) *become profitable*
- 2) *get a clearer picture of what my fixed and variable expenses are, and*
- 3) *gain clarity on when I'm going to run low on cash.*

In the next 6 months: *I will commit to using a system to track cash flow accurately.*

What's holding me back: *I avoid financial matters because I'm not good with numbers.*

Let's go!

### Leadership & Vision

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?
- 

- What's **holding you back** from taking action?
- 
-

## Strategy

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

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## Products

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

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\_\_\_\_\_

**Marketing & Messaging**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

\_\_\_\_\_

\_\_\_\_\_

**Sales & Accounts**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

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\_\_\_\_\_

## Financial & Cash Flow

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

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## Operations & Management

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

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## People / Team

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

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\_\_\_\_\_

## Supply Chain

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- What's one **goal** you want to achieve in the next 6 months?

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- What's **holding you back** from taking action?

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\_\_\_\_\_



## SET SMART GOALS

Now, for each of the area goals you wrote down in the previous section, let's use the SMART framework to turn them into actionable goals.

Each goal needs to be:

- 1) **S**pecific,
- 2) **M**easurable,
- 3) **A**chievable,
- 4) **R**elevant, and
- 5) **T**ime-bound

It would be correct to say that goals without these elements aren't really goals but wishes.

Download the [SMART Goal Template](#) that you will use to turn each goal from the previous exercise into a SMART Goal. Print out 9 copies of the SMART guide template, one for each goal.

### Instructions for SMART Goals:

1. Fill out the SMART framework on the template for each goal. Examples are listed below:

- **SPECIFIC:** What exactly do you want to accomplish?  
(Example: "Increase my sales by 20%.")
- 

- **MEASURABLE:** How will you measure success?  
(Example: "Track monthly revenue.")
- 

- **ACHIEVABLE:** Is this goal realistic given your current resources and time?  
(Example: "Yes, with an updated marketing plan.")
- 

- **RELEVANT:** Why does this goal matter to you?  
(Example: "It aligns with my business growth strategy.")
- 

- **TIME-BOUND:** What's your deadline?  
(Example: "Within 6 months.")
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## PERFORM A TIME AUDIT

This section of your **Guide** will reveal how you spend your time so that you can be more intentional about what you fill your day with. After doing this exercise, many people are embarrassed at just how much time is spent doing things they don't really value. Reclaiming poorly spent time is the easiest way to free up resources and reprioritize what you do.

This can be a challenging exercise to experience because it requires regular check-ins all day long. A 30-minute timer (your phone has one) is very useful for this.

### Instructions:

1. First, download the: [Time Inventory Worksheet](#).
2. Then, for one full day, track how you spend your time in 30-minute increments. When you wake up, start the 30 minute timer. When the timer goes off, write down how you spent the last 30 minutes onto the Time Inventory Worksheet.
3. At the end of the day, categorize each 30-minute block into one of three buckets:
  - **Essential Tasks** (directly tied to your goals)
  - **Supportive Tasks** (indirectly tied to your goals, like emails or meetings)
  - **Distractions** (low-value tasks that don't contribute to your goals)

### Assess:

- What percentage of your day was spent on Essential vs. Supportive vs. Distraction tasks?
- What activities can you eliminate or delegate to make room for higher-value tasks?
- How much time could you save by eliminating even one or two Distractions?

## RECAP

In this Guide, if you've been playing along, you should have:

1. Completed a high-level assessment of your business's different areas
2. Brainstormed potential improvements for each business area
3. Identified one task or goal to enhance each area, along with potential obstacles
4. Transformed each idea into a SMART Goal:
  - Specific
  - Measurable
  - Achievable
  - Relevant
  - Time-bound
5. Conducted a time audit to:
  - Increase your productive hours
  - Reduce distractions

These steps have laid the groundwork for meaningful improvements in your business operations and personal productivity. Not bad for a few hours!

## WHAT NEXT?

Creating a successful business doesn't require secret plays or genius-level IQ. It does, however, demand commitment, consistency, and accountability.

Even the simple exercises in this guide can create momentum if done with intent and focus. But remember, this Starter Guide is just that – a start.

At the beginning of this guide, I said, "In any endeavor, achieving your goals requires a solid plan and consistent execution."

While that's true, I omitted one crucial element: accountability.

As social beings, we're meant to work together. Group activities have a unique energy – it's infectious. More importantly, people often push themselves harder for others than they do for themselves. This is why having supporters in your corner can be a game-changer.

If you're curious about how coaching could benefit your business, I'd love to have a no-obligation discovery call to discuss your goals and see if we're a good fit.

Should we work together, I promise you three things:

1. I will tell you the truth.
2. I will call you on your blind spots.
3. I will hold you accountable.

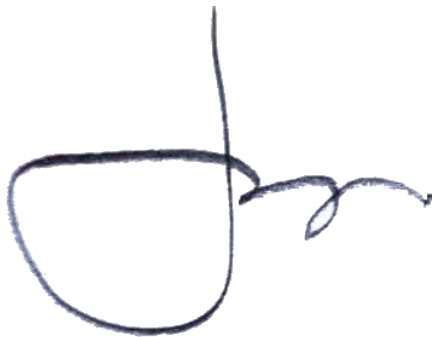
As Tony Robbins says, "If you want to be successful, find someone who has achieved the results you want and copy what they do, and you'll achieve the same results."

If you're interested in more personalized guidance on building and executing your full Playbook, [click here to schedule a free Discovery Call with me](#).

Or visit [www.whatismyplaybook.com](http://www.whatismyplaybook.com) and click on "[Schedule A Discovery Call](#)."

Whether you choose to work with a coach or continue on your own, I wish you the best in your business journey. The fact that you've completed this guide shows commitment to growth and success.

Keep pushing forward!

A handwritten signature in blue ink, consisting of a large, stylized 'J' followed by a smaller, cursive 'im'.

Jim