

7 Never Fail Strategies for Your New Year Goal Setting

Workshop by Bethany Mascena Tracy

INTRODUCTIONS





ARE YOU SATISFIED?





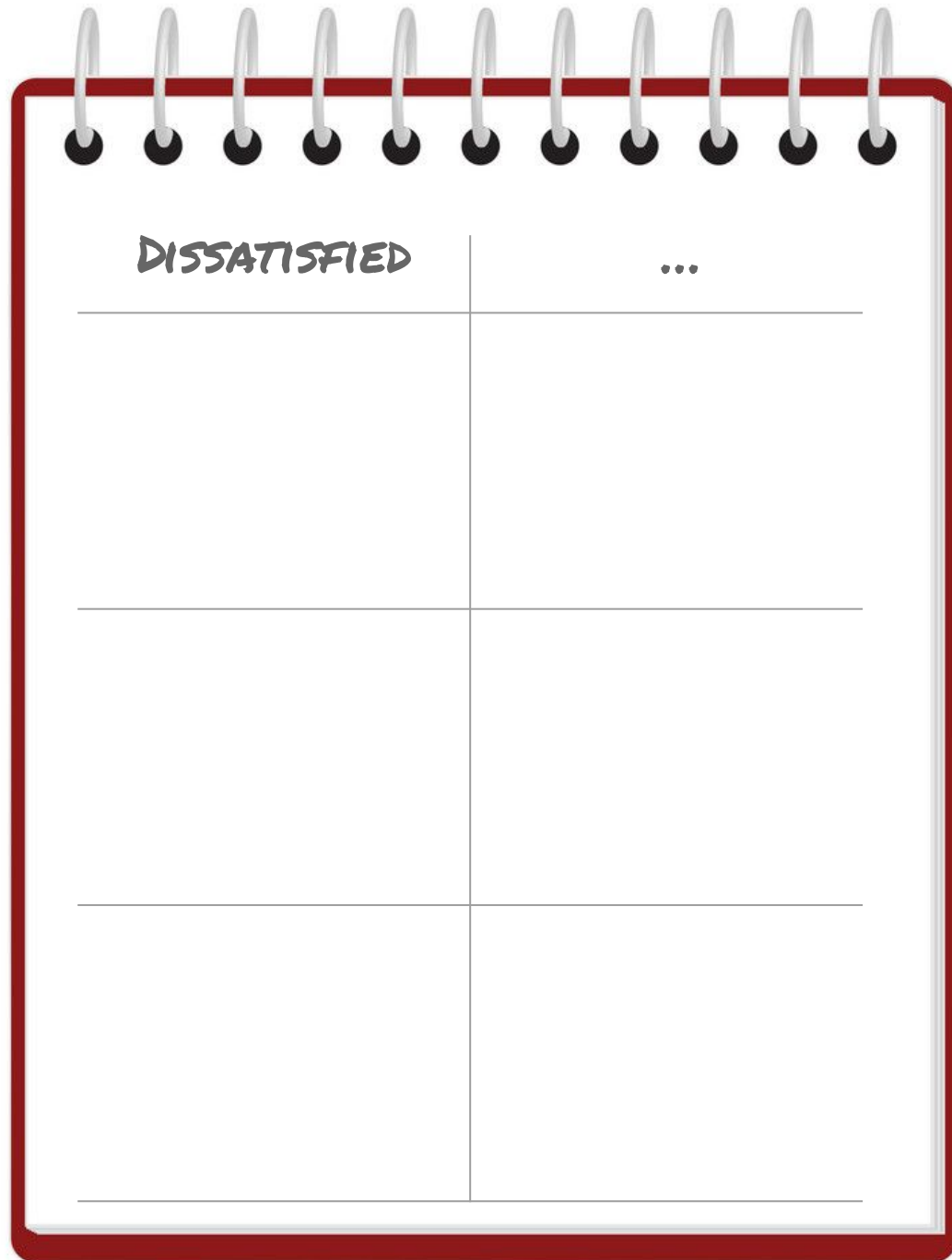
What is **POSITIVE DISSATISFACTION?**

- Overly critical when we miss a goal and not motivated to push harder.

VS

- Strive for better, stronger, get fired up and do something!

**Are YOU
Satisfied?**



Activity Set Up



**Write 3 occasions
when you were
overly critical of
your results.**

Belief that your most basic abilities can be developed through dedication and hard work— **GROWTH MINDSET**

(Dweck, 2015)

What is
YOUR
mindset?

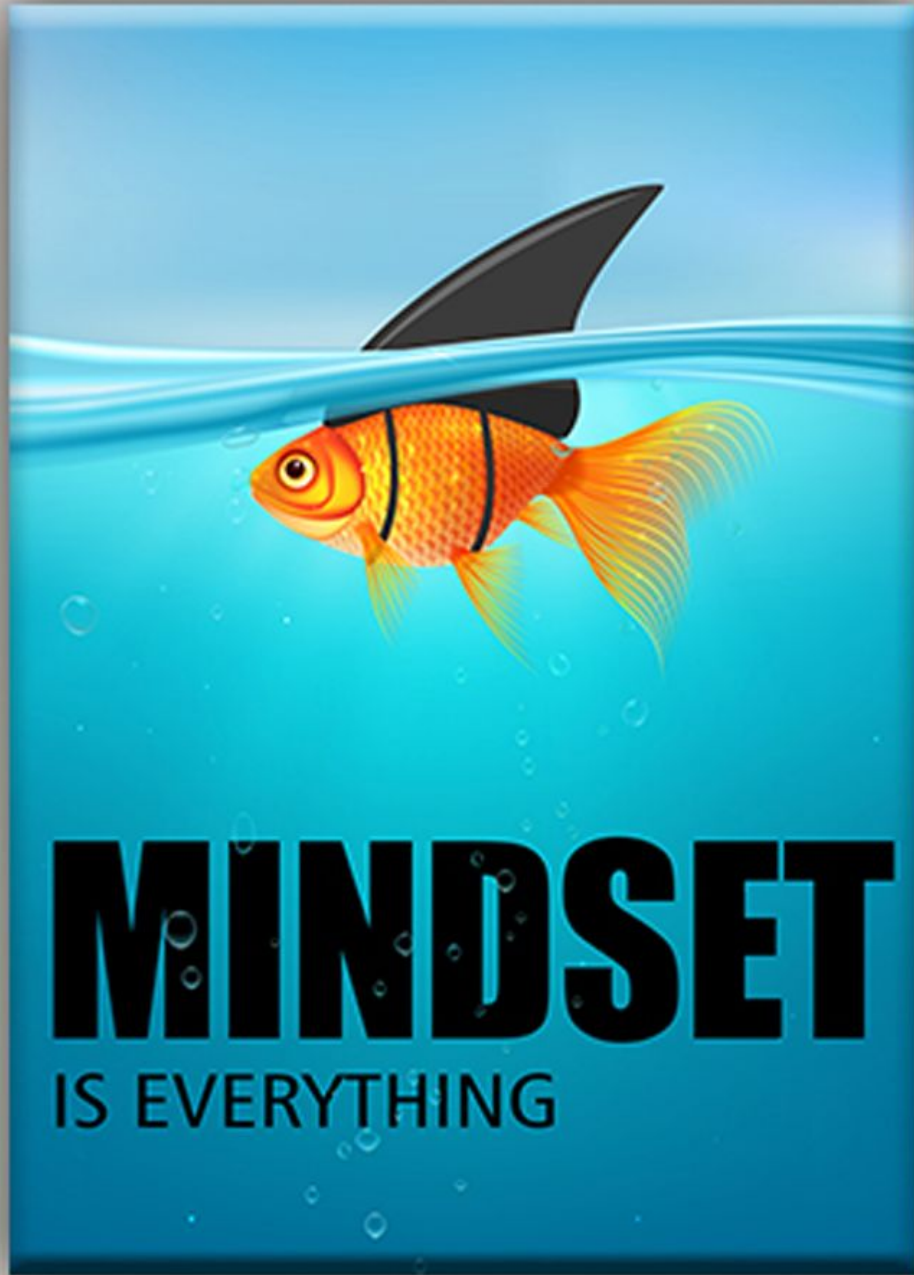
Spark your mind to reframe...

- How is this a gift?
- What have I learned about me? the situation?
- What can I control?
- What am I fired up to achieve?
- What's another way to reach my goal?

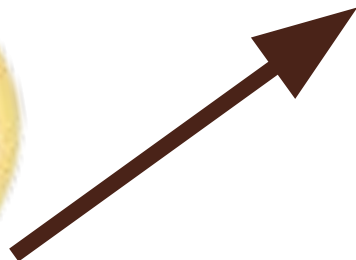
**Thought
starters**

DISSATISFIED	REFRAME
EVENT #1	
EVENT #2	
EVENT #3	

Activity Set Up



**Rewrite,
reframing and
refocus your
results.**



7 Never Fail Strategies

- 1) Determine where you are dissatisfied
- 2) Reframe how you think about your situation
- 3) Decide to change what you are doing
- 4) Find lowest common trackable activity
- 5) Create tracking tool
- 6) Define your reward
- 7) Repeatable success

S

Specific



Who, what,
where, when,
why

M

Measured



You can't
improve what
you don't
measure

A

Achievable



Challenging but
not impossible

R

Relevant



Closely
connected to
the objective

T

Timed



A completion
date holds you
accountable

GOALS

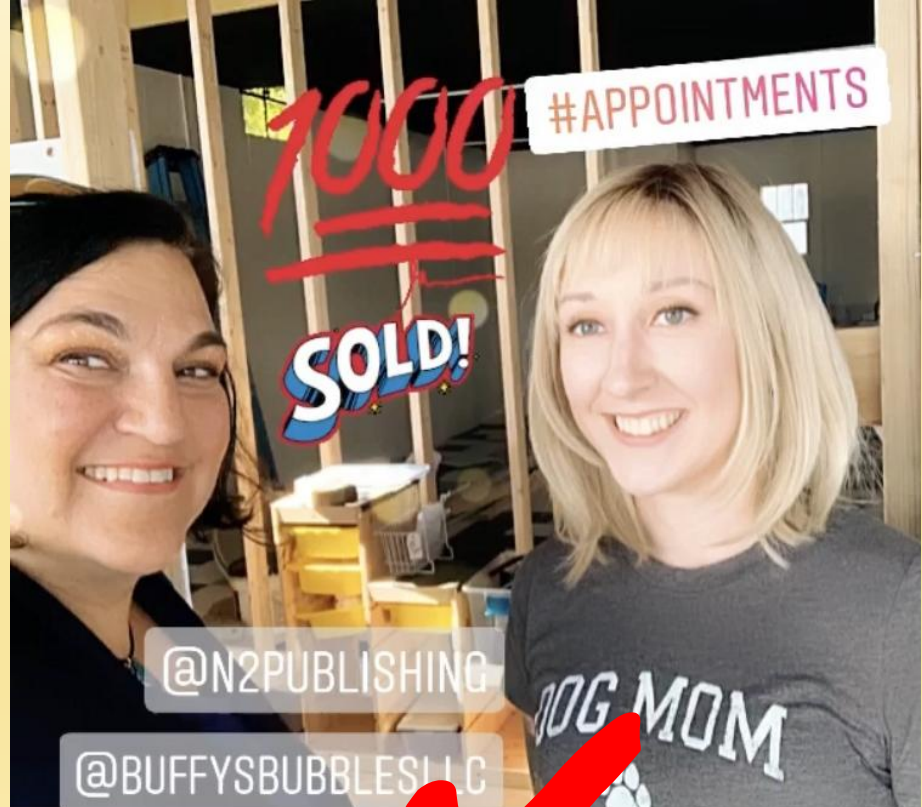


Activity Set Up



**Use one area
you reframed
and develop a
S.M.A.R.T. goal**

TRACK TOWARDS SUCCESS





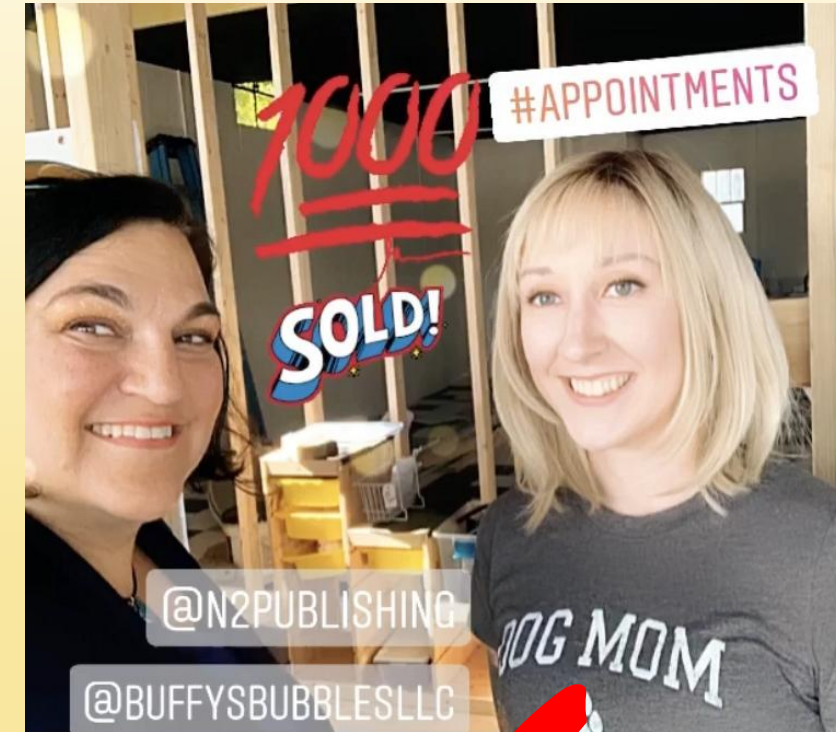
**Revisit your
S.M.A.R.T. goal
and determine
lowest common
trackable activity**

be committed
to the process
without being
emotionally
attached to
the results.

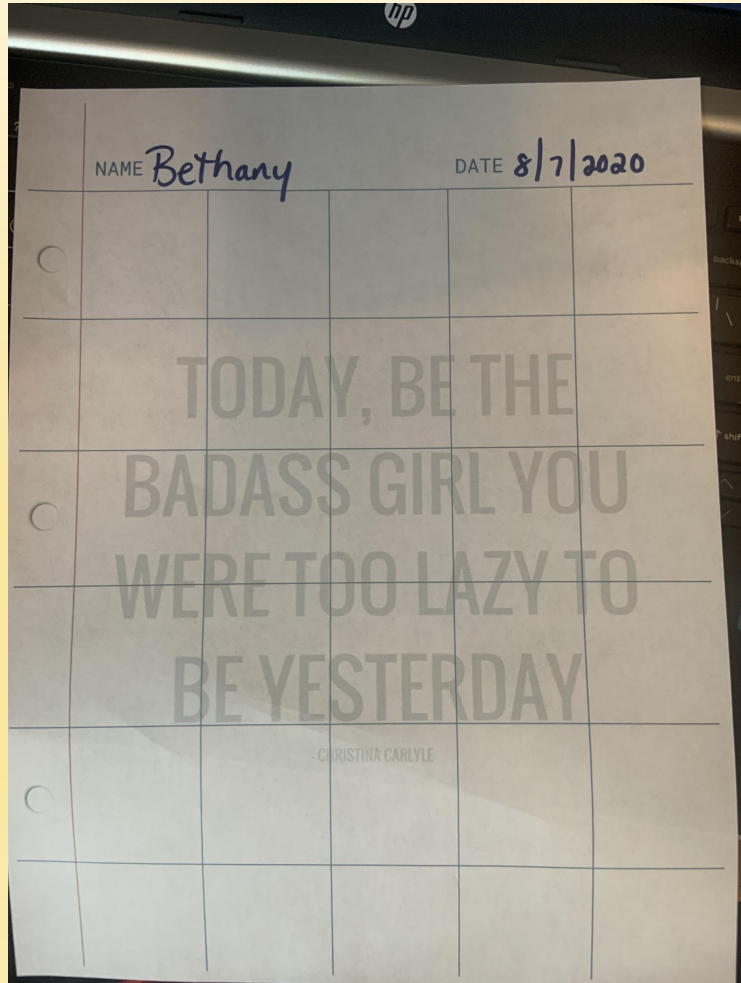


Strategies to Track To Your Success

TRACK MY GOALS



TRACK MY GOALS



TRACK MY GOALS

BMT Road to Print

calls	1st (set) Appt (comp)	Sales	notes
11/2 131	10/5	0	
11/9 100	9/6	0	
11/16 127	13/9	2	- all Scapes - 1st Choice Pet
11/23 thanks give	5/3	1	- Classic Chimney
11/30 85	10/8	0	
12/7 30	8/8	0	* tried coaching "you" - lean back
12/14 67	8/6	0	
1/4 70	7/3	2	* 1 cancelled * 1 - Friendly Scopic
1/12 95	15/10	1	- Seward Bear
1/18 50	10/8	0	- Drop down - more casual
1/26 69	14/9	0	* very frustrated
2/1 87	12/10	2	- 1 cross sale (inspiration) - 1 - work neck (Aaron Greenlee law)
2/8 39	15/10	1	- cross sale - ESL (Jessica Roman)
2/15 39	13/8	1	- Amenprise
2/22 53	14/14	0	* NO CANCELLATIONS!! * second contract in 2 weeks
2/29 55	11/7	0	lots of cancellations frustrated
3/1 42	15/9	0	lots of cancellations frustrated
3/14 40	14/13	1	- 1 - work neck
3/21 91	13/11	4	- 1 - work neck
3/28 47	14/10	1	- 1 - work neck


7/10/16 processed 1,896 calls
284 appts
27 sales
10 resident articles
79 photos

MILESTONES

GOAL #1: BREAK EVEN

\$4,855 in monthly needed to cover print expenses & 15% ad value

Deadline: 11/1/2021



72.1%

\$1,354 needed to be at 100%

Additional Orders Needed: 6
based on your average monthly sales rate


To meet this deadline, you need to sell 4 orders per week for the next 1.5 weeks

With an average closing ratio of 20% and 0% cross sales, this means completing about 20 appointments / week

GOAL #2: GENERATE A MONTHLY PROFIT OF \$3,000

\$8,385 in monthly needed to cover print expenses, 15% ad value & profit goal

Deadline: 12/1/2021



41.8%

\$4,884 needed to be at 100%

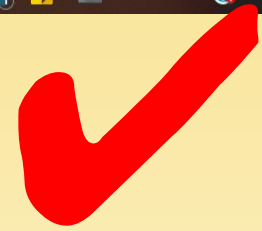
Additional Orders Needed: 22
based on your average monthly sales rate

To meet this deadline, you need to sell 4 orders per week for the next 6 weeks

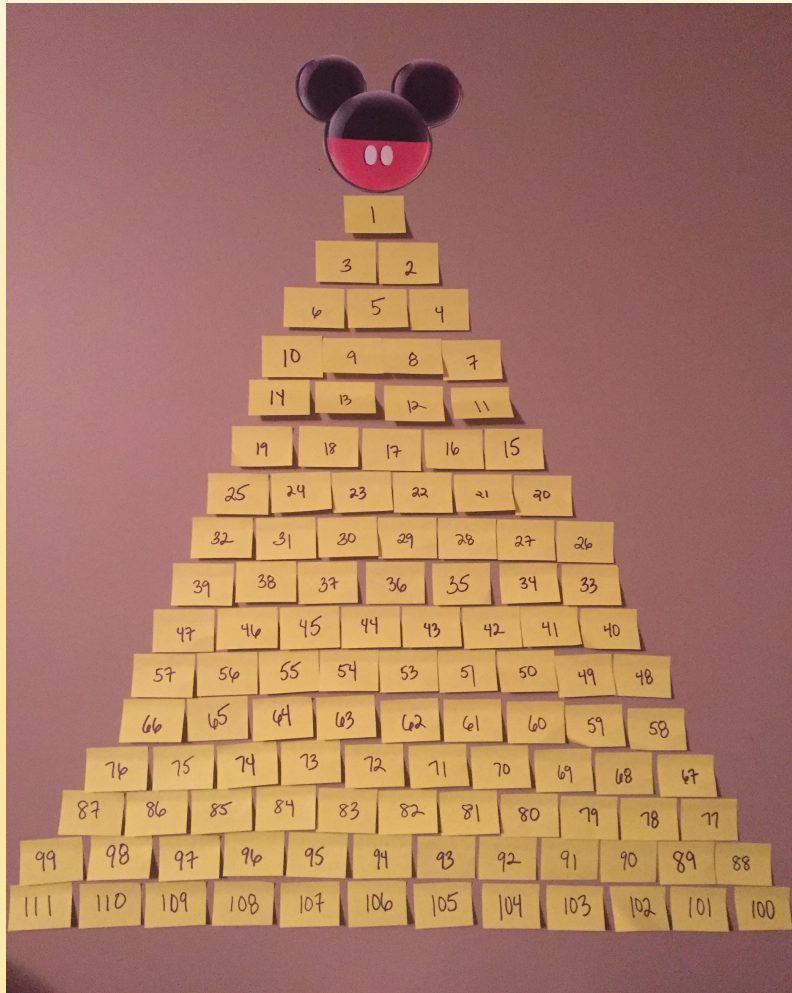
With an average closing ratio of 20% and 0% cross sales, this means completing about 18.5 appointments / week

STATS

Getting To Print | Appointment Tracker | Year 1 Profit Planner



TRACK MY GOALS



CAMPAIGN 1: January to May 2018
GOALS: \$10K

DATE	Activity		Warwick Neck Sales			Cross Sales			RUNNING TOTAL		
	60 Calls	6 Appts	#	Sales	Term	#	Sales	Term	#	SALES	NET
1/8	15	1									
1/15		3 appts	1	310	24				1	310	310
1/22	16	3 appts	1	195	12				2	505	505
1/29		5 appts									
2/5	30	4 appts				1	60				
2/12		4 appts									
2/19											
2/26				400	24						
3/5				150	6						
3/12											
3/19				166	12						
3/26											
4/2	15	6		195	18						
4/9											
4/16				195	36						
4/23											
4/30											
5/7				800	12						
ACTUAL											
GOAL				90							



Portal ID: 3063

Call Start Time	Appt Set	NO	Left Message	Call Back	Email	No Answer	Decision Makers	Total Calls
2pm		1		1		1		9
3pm		1		1				16
4pm		1		1				13
2pm		1		1		1		16
10am				1		1		16
11am				1		1		10
2pm		1		1			1	15
3pm		1		1			1	4

Handwritten notes: 13/30 set, 20.3 CPA, 4/30 set, 20.3 CPA

TRACK MY GOALS

MONTHLY SNAPSHOT [MAY 2021]

Honestly rate where you are at TODAY on a scale of 1-10 in the following areas.

✗ Mark one number per category. 1 = worst case scenario 10 = ideal / best

Category	1	2	3	4	5	6	7	8	9	10
Commitment to Fitness					✗					
Healthy Eating				✗						
Finances									✗	
Launch Success / Progress									✗	
Staffing & Systems									✗	
Clarity of Goals & Vision									✗	
Growth & Learning										✗
Sense of Contribution										✗
Impact of Coaching on team										✗
Impact of contribution on N2									✗	
Commitment (Did I give my best?)										✗
Fun Factor! (Am I having FUN? :)									✗	
TOTAL (add up numbers)										59/A+

Month 4: [NOVEMBER]

WIN & CELEBRATION from the last 30 days!

- Completed my goal of **16 (or more) appts** by 10/29 - my N2 anniversary.
- Despite being discouraged with only 1 sale in Oct, I renegotiated my goal and decided to include renewal appts in my goal...which ultimately led me to focus on calling clients up for renewal and hitting a **73% renewal rate** for 2020!!!!
- Completed **6 renewal calls** by Nov 2nd deadline.
- **Hired Client Liaison** to connect face to face with all clients 1x quarter
- Moved my **Avg % to Launch** from 29% to **81.8%** for all ADs trained in Sept or earlier and 32% for ALL preprint ADs on my team. Nov - 2 preprint ADs will launch, cut ties with 3 underperforming ADs.
- Personally, I cooked for my family regularly throughout October. Plus, I climbed Mount Monadnock in New Hampshire on Oct 10, 2020!

Monthly Goal Declaration: 3 professional & 3 personal goals you are committed to achieving

PROFESSIONAL

- Launch 2 preprint ADs in November at \$3K or more in monthly. 🎯
 - Complete 18 appts before Thanksgiving? - get dialing! 📞
 - New England Culture Ambassador by hosting Virtual Happy Hour for team 🗣️
- #### PERSONAL
- Cook dinner 2x or more per week for family
 - Exercise 3x a week and track meals in Noom 5x a week.
 - HOLD Order Christmas cards, start Christmas shopping, create family calendar and photo book 📅

What reward(s) will you give yourself at the end of the month after you CRUSH these goals?

When I crush my professional goals, I am going to **TAKE DECEMBER OFF** from doing Sales Appts 🎁 so that I can prepare and enjoy the Advent and Christmas season with my family 🎄

What will the consequence(s) be if you do not accomplish these goals? (how will it feel, what will be the impact, who will it affect, etc)

If I do not complete my professional goal #2, I will complete 10 appointments in December.
If I do not complete my personal goal #2, I will go to the gym 3x week





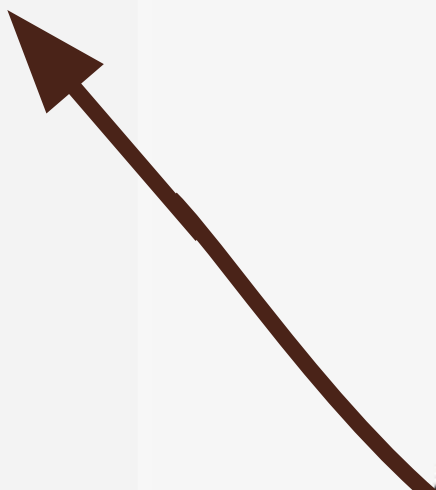
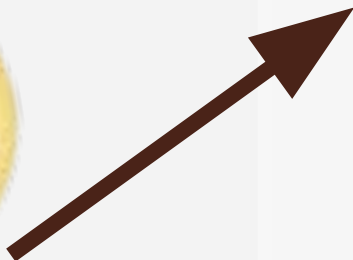
**Determine your
tracking tool**

DEFINE REWARDS





**How will you
reward yourself
for doing the
work?**





**BIGGEST
TAKEAWAYS?**