

5-Year Plan: Got Goals? Get a Plan

Toolbox Teleclass Transcription

By Debra Russell



Professional Program

**Track 1: See Your Future: Create Your
Business Vision, Goals and Plans**



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INTRODUCTION

Welcome to the March 2009 re-recording of the Toolbox Teleclass, 5 Year Plan: Got Goals? Get a Plan. I have been presenting this workshop live over the last several years since it was originally recorded and wanted to re-record it, and add in some materials, as well as, you know, the sharpening and honing that a process gets through repetition.

This is also the first time that I am recording a call direct to audio as oppose to recording a conference call. And the...if anyone has feedback on how this works for them, whether good or bad please let me know.

FAIL TO PLAN, PLAN TO FAIL, RIGHT?

Okay, so fail to plan, plan to fail right? We've all heard this, and I would guess that most of us know that is having a 5 year plan for our lives, for our careers, for what we want to create is a good idea.

IT'S LONG BEEN HELD THAT THE MOST SUCCESSFUL PEOPLE IN OUR WORLD ARE SUCCESSFUL BECAUSE THEY HAVE A LONG TERM PLAN.

It's long been held that the most successful people in our world are successful because they make long term plans.

OR AS SOMEONE AT THE TAXI ROAD RALLY SAID TO ME – IF YOU DON'T KNOW WHERE YOU'RE GOING, YOU WON'T KNOW WHEN YOU DON'T GET THERE!

Or as someone at the Taxi Road Rally this year said to me, "If you don't know where you're going, you won't know when you don't get there." I really liked. But if creating a long term plan, creating a 5 year plan is such a good idea and is so important to our success, why do we resist it so much?

CREATING A LONG TERM PLAN

CONS – IF THIS IS SUCH A GREAT THING, WHY DOESN'T EVERYBODY DO IT?

Why does it feel like such a hard thing to do? If this such a great thing, why doesn't everybody do it?

WANTING TO DO IT RIGHT

Now when I present this program live, I usually do some brainstorming with the audience, and the answers that most people come back with are that they want to do it right, and they don't really feel like they know how to do it.



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WHAT IF I CHANGE MY MIND?

They're afraid to make a 5 year plan because what if they change their minds? You know, what if they make their big plan, but then, you know, it isn't really what they end up wanting.

I DON'T KNOW ENOUGH ABOUT THIS BUSINESS, WHAT IF MY PLAN IS WRONG

Some people feel like, well, you know they don't know...they're so many unknowns, particularly in the area of arts and entertainment industry. It feels like so much is dependent on luck and circumstance. How on earth could you create a 5 year plan? What if the plan you create is wrong...it doesn't work out that way?

IT FEELS LIKE A HUGE, OVERWHELMING RISK

And it just feels like a huge overwhelming risk? It feels really big, like it's really hard. So, in the face of all that, why do we want to do this?

PROS – WHY DO WE WANT TO DO THIS

What are the pros for creating a 5 year plan? And again, in brainstorming with an audience, the answers I've gotten back, of course, is that the studies that show that people who create goals and a plan are more likely to succeed.

STUDIES SHOW THAT PEOPLE WHO CREATE GOALS AND A PLAN ARE MUCH MORE LIKELY TO SUCCEED

GIVES YOU A SPECIFIC ROAD MAP FOR HOW YOU ARE GOING TO GET TO YOUR GOALS.
This seems to be pretty fairly widespread understood that, you know, it's a good idea. In my experience, it gives you a specific road map for how you're going to go about getting to your goals.

WOULD YOU GO ON TOUR WITHOUT A ROAD MAP? THAT WOULD BE CRAZY, RIGHT?

I mean...would you go on tour without a road map? That would be crazy right? Would you go on a long trip without a road map? You know, most people, most trips, no. Of course not.

THEN ISN'T IT EVEN MORE CRAZY TO EMBARK ON THIS MUCH BIGGER JOURNEY OF YOUR CAREER WITHOUT A ROAD MAP?

Because how on earth are you ever going to get to where you want to go? Well, isn't it more crazy to embark on this much bigger journey of your life, your career without some kind of a road map? So what stops people? Why does this seem so challenging, so hard?



SO WHAT STOPS PEOPLE?

TRYING TO WORK FORWARD FROM WHERE YOU ARE NOW, INSTEAD OF BACKWARD FROM WHERE YOU WANT TO BE

One of the biggest mistakes I see people make is that they try to work forward from where you are now, instead of backwards from where you want to be. I mean just think about this. If you were sitting down to plan a trip, wouldn't you know what the destination is before you pull out the maps? I mean how else would you pull out the right maps?

AN UNWILLINGNESS TO JUST SAY WHAT YOU WANT – SPECIFICALLY!

The best is to know where you're heading, and then plan backwards. The other obstacle I see come up for people is an unwillingness or a resistance to just flatly saying what they want specifically.

AN UNWILLINGNESS TO BE WRONG

You know people say, "Oh I want to be successful. I want to be well known." You know, what does that mean really? Exactly! For you specifically. I think that a lot of people struggle with an unwillingness to be wrong. You know, if I'm going to spend this time creating a plan, I want to be right. I want the plan to be the right plan. And I want to be proven that it's right because I...because it turns out the way I want it to.

JACK CANFIELDS – CONSIDERATIONS, FEARS, ROADBLOCKS

One of the...you're hearing my cat meowing in the background because it's getting close to dinner time, but we're going to ignore her. So, one of my favorite books - *The Success Principles* by Jack Canfield in Principle Number...let's see what number this is...Principle Number 7, and that's of course 7 out of 64 Principles. It's a great book by the way.

In Principle Number 7, which is Unleash the Power of Goal Setting, he talks about something called considerations, fears, and roadblocks. And I'm just going to read you a little bit of what he says in this. "It's important to understand that as soon as you set a goal, 3 things are going to emerge that stops most people, but not you. If you know that these 3 things are part of the process, then you can treat them as what they are, just things to handle rather than letting them stop you."

"These 3 obstacles to success are considerations, fears, and roadblocks. Think about it. As soon as you say you want to double your income next year, within moments considerations such as, 'I'll have to work twice as hard' or 'I won't have time for my family' or 'My wife is going to kill me,' begin to emerge. You might have thoughts such as, 'My territory is maxed out. I can't see how I could possibly get the buyers on my



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current route to buy more product from me.' If you say you're going to run a marathon, you might hear a voice in your head say, 'You could get hurt' or 'You'll have to get up 2 hours earlier every day.' It might even suggest that, 'Oh, you're too old to start running.'

"These thoughts are called considerations. They're all the reasons why you shouldn't attempt the goal. All the reasons why it's impossible. But surfacing these considerations is a good thing. They are how you have been subconsciously stopping yourself all along. Now that you have brought them into conscious awareness, you can deal with them, confront them, and move past them."

So in other words, we avoid making this 5 year plan, setting these goals, because these considerations are already running unconsciously underneath. And so when we sit down to put goals on paper, they start showing up, and we don't want them so we don't actually write the goals down.

The second thing are fears. Now fears on the other hand, and again, I'm reading from Jack Canfield's book, are feelings. "You may experience the fear of rejection, a fear of failure or a fear of making a fool of yourself. You might be afraid of getting physically or emotionally hurt. You might be afraid that you will lose all the money you have already saved. These fears are not unusual; they're just part of the process."

I think for a lot of people sitting down to create a 5 year plan is scary, but fear is just an emotion. It doesn't have any other meaning except what you give it. It's just an emotion, and if your fear is so big that you can't do this, and I recommend listening to the [Overcoming Fears](#) call, which gives you some tools for handling your fears. Also, the [Emotional Intelligence](#) call would be helpful for this as well.

And back to Jack Canfield's book, "Finally you'll become aware of roadblocks. These are purely external circumstances well beyond just thoughts and feelings in your head. A roadblock may be that nobody wants to join you on your project. A roadblock may be that you don't have all the money you need to move forward. Perhaps you need other investors. Roadblock might be that your state or national government has rules or laws to prohibit... that prohibit what you want to do or make them more complicated or more difficult."

In fact, I was just reading on the Focal Lions West list serve about city governments levying taxes on performances and CD sales. It's just ridiculous. Maybe you need to petition the government to change the rules. So, yes, roadblocks are going to show up. Of course you may not encounter roadblocks that require you to approach a Governor, but then again, depending on how large your goal is, you very well might.



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Roadblocks are simply obstacles that the world throws at you. It rains when you're trying to put on an outdoor concert. Your wife doesn't want to move to Kentucky. You don't have the financial backing you need, etc., etc., etc.

Roadblocks are simply real world circumstances that you need to deal with in order to move forward. They simply exist out there, and they always will. Unfortunately, when these considerations, fears, and roadblocks come up, most people see them as a stop sign. They say, "Now that I'm thinking that, feeling this or finding out about that, I think I won't pursue this goal after all."

But I am telling you not to see considerations, fears, and roadblocks as stop signs, but rather as a normal part of the process that will always appear. I think that when you try to create this 5 year plan, you're actually avoiding facing those roadblocks, fears, considerations that you know you're going have to deal with if you go after your dreams.

And I'm saying accept them as part of the process. You will face them in order to go after your dreams. And isn't it worth it to go after your dreams? Isn't it worth it?

A DIFFICULTY IN IMAGINING A FUTURE YOU HAVEN'T EXPERIENCED YET

So, what else stops people from creating their 5 year plan? Very often, it's a difficulty in imagining a future you haven't experienced yet. If your dream is about doing something that you've never done before, then you may just feel challenged in imagining it. I will tell you that imagination is a muscle that will get better the more you work it. It's okay if the first time you create your 5 year plan, you struggle with this and you do the best you can.

You come up with the best version of this as you can. That's okay because next year, you'll be doing it again. It will be a new 5 year plan, because 5 years from today is a different date than 5 years from a year from now, right?

And you will have exercised this muscle more, and you'll get better at it. The other thing I recommend doing, and this is something that I have done, is that you put yourself in a physical situation that is completely different than your norm.

So if you generally work at a desk in your living room or your office, that you don't do it at a desk in your living room or your office. That you do this at Starbucks or you take a weekend and go to the beach and do it there or you go to a friend's house who is working, ask their permission to go into their home when they're not home, when no else is home. It's not your space. It's their space. Go into that space and work on this plan.



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Your creativity muscle will be woken up by your new physical environment, and it will work better in that environment.

BEING UNCLEAR ABOUT WHAT SUCCESS LOOKS LIKE TO YOU.

So the final thing that I've noticed stops people from creating their 5 year plan is being unclear about what success looks like to you.

In fact, I've had the experience where a client created a 5 year plan, and then discovered all the things that she thought was supposed to be defining her success, really weren't her definitions of success. They were other people's definitions of success. You know, she had on her 5 year plan that she was going to tour the world. Truth was she hated touring.

And what was interesting is when we tried to get into action, once she'd created her 5 year plan, and we tried to get into action creating the first step in that 5 year plan, she couldn't do it. She couldn't get into action, because she'd created such a good plan that inside she knew if she pursued this...if she actually took the actions that she had on her 5 year plan, that it would lead her to a life that she didn't want to live.

It would lead her to a life that wasn't really her dream, and when we clarified that, and made a 5 year plan that is being true to her personal definition of success, getting into action got much easier.

So, be clear about what success means for you, so that when you sit down to write your 5 year plan, it's easy, clear, and actionable.

DEFINITIONS

Okay, and finally I want to clarify some definitions and language. Um, just taking a drink of water.

I want to clarify the difference between a goal and an action. A goal is an end result; it's a having or being, not a doing. So, for example, a goal is a "Fall tour fully booked."

A doing or an objective, an action that will help you get that goal is calling 5 venues a week to book my Fall gig...to book my Fall tour. Okay? Do you see the difference? The first thing is the result. It's the end result. It's what you will have in place. It's measurable. It's specific. It's in a language that gets you excited and inspired. It's visionary, and it's got a specific date on it.

So I'm going to say those 5 things again. It's measurable. It's specific. It's inspiring, you know, in other words the language that creates momentum and creates excitement in you. Okay now, I'm forgetting...it's visionary, meaning it's clearly on the path to the life of your dreams, and it's got a specific date.



GOALS VS. ACTION STEPS

PLAN STARTS WITH THE GOALS FIRST

If you don't have a goal, it's just a long ToDo list and don't we all have enough to do?

So, plans start with the goals first. If you don't have a goal, it ends up just being a long to-do list. For God's sake, don't we have enough to do? Really, if you create a 5 year plan that's just one honking to-do list, it's going to overwhelm you, frustrate you, and be really hard to take action on.

If on the other hand, the plan starts with the goals, and then you create an action plan for the most recent piece of that, so you have a 5 year plan, and you break it down into 4 years, 3 years, 2 years, 1 year, 6 months, 3 months, and then you've got an action plan, a list of actions that will create that 3 year goal...3 month goal, then you can take action. But you are not going to create a to-do list that's going to get you to that 5 year goal, because it's just hard to wrap your brain around them.

OVERVIEW OF STEPS

So what we're going to work on today is the 5 year goal plan. Okay? So the next thing I want to do is give you an overview of what the steps are. And then, I'm gonna... I'm might break it into a bit more detail.

DAYDREAMING AND BRAINSTORMING – IN 5 YEARS, WHERE DO YOU WANT TO BE?

So the first step is daydreaming and brainstorming. And by the way, if you go to the website, the [Artist Edge Membership website](#), and you go to the post for this call, there is a [worksheet set](#) that you can download. It's a PDF, and you can download it and work it. I actually recommend that you download it and not work it on a computer, that you work it by hand, because I think that writing stuff by hand will free up some of your creativity juices.

Something about looking at it on screen in print, especially in this step, the daydreaming and brainstorming step, it can look a little intimidating. Also, it's going to make it easier to go to the next step, which I'm going to get to in a minute.

So daydreaming and brainstorming. In 5 years, where do you want to be?

BE OUTRAGEOUS

Now in this step, you want to be outrageous. Don't limit yourself to one aspect of the business or one aspect of your life. This is all of your life in 5 years where you want to be.



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DON'T LIMIT YOURSELF TO ONE ASPECT OF THE BUSINESS OR ONE ASPECT OF YOUR LIFE

BE SPECIFIC AND BE DETAILED

Be specific, and be detailed. Write everything down. You are not committing to anything at this point. Just write it all down. It's one big brainstorming list with no filtering.

WRITE EVERYTHING DOWN – YOU ARE NOT COMMITTING TO ANYTHING AT THIS POINT – JUST WRITE IT ALL DOWN!

DID I SAY, BE OUTRAGEOUS?

NOTHING IS TOO AMBITIOUS, OUT OF REACH, UNREALISTIC – EVERYTHING IS POSSIBLE.

And, oh, did I say be outrageous? Nothing is too ambitious, out of reach, unrealistic. Everything is possible in this stage. Write down everything that you want in your life in 5 years.

ORGANIZE THE BRAINSTORMING – SIFTING AND SORTING

THIS IS THE STEP WHERE YOU GET TO QUESTION – DO I REALLY WANT THIS THING? IS THIS THE KIND OF LIFE I WANT?

Second step, organize the brainstorming. So now this is the place where you do the sifting and sorting. This is the step where you get to ask the question, "Do I really want this thing? Is this the kind of life I want?" Notice I'm not telling you to ask the question, "Is this possible?" We're not there yet.

You're only asking, "Do I want this? Is this really the life I want? Or is this the life I'm supposed to want?" Okay. I find this to be really true among artists, you know, "Oh, I want a Grammy." Really? Are you sure? "I want to be famous." Are you sure you want to be famous? Because you know what? You can have an incredibly successful life and business in the world of arts and never be famous. You don't need to be famous in order to be successful.

CREATE CATEGORIES OF GOALS THAT ARE CLEARLY LINKED

So if you don't want to be famous, you don't have to be. Okay? Do you really want this thing? Is this the life you want? Next, you're going to sift through all of that brainstorming and kind of look for the categories of goals that are clearly linked. So you may have, for example, goals around your relationships, and you may have goals around your home and living environment.

You may have goals around your career, and even within your career, you may have goals within that, so there may be sub-categories. Within your career for example, you



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may be wanting to earn a certain amount of money a year. You may want a certain level of performance, for example, touring or gallery shows or showing in museums. You may want to be a, you know, doing...I mean for me I want to be on the Oprah show. That's a level of success I want to reach.

So what is it? What are the categories, the performance categories, the sales categories, the recognition categories? What are the different categories within this whole 5 year goal? And identify what are the categories and maybe create a list of them.

WRITE EACH GOAL ON EITHER A POST-IT OR 3X5 CARD AND CREATE A PILE FOR EACH CATEGORY.

Then you're going to take each goal that has made the first cut. In other words, it really is something you want. It really will lead you to the kind of life you want to live. Write each goal on either a Post It note or 3x5 card, and then create a pile of those within each category. Now, you're going to take one category at a time, and this is still part of step 2, Organizing the Brainstorming.

TAKING ONE CATEGORY AT A TIME - PUT THEM IN ORDER (IF I WANT A GRAMMY, THEN I'VE GOT TO RECORD MY CD FIRST)

You're going to take one category at a time and put them in the order that seems to make the most sense. Now, I know you may not know. That's okay. Somethings may seem like they should happen simultaneously. That's okay too. Just put them in an order.

DON'T WORRY TOO MUCH ABOUT DOING IT PERFECTLY

Don't worry about doing it perfectly. Again this is just an organizing section, okay.

WORKING BACKWARDS CREATE A GENERAL TIME LINE

Step 3. Working backwards, create a general timeline. This is a timeline of goals, again not how to steps, so you want to put the goals that belong 5 years from now, 4 years from now, 3 years from now, 2 years from now, 1 year from now, 6 months, and 3 months. I expect that there will be a lot of holes, and that's okay.

You take the goals that you've already got written, and you ask yourself, "Is this a 5 year goal? Do I think this might be 3 year goal? Is this something I need to do in the next 3 months?" And just, in general, put them under the time category that you think they should fit. And again, doing one category at a time.

THIS IS A TIME LINE OF GOALS – NOT HOW TO STEPS!

5 YEARS, 4 YEARS, 3 YEARS, 2 YEARS, 1 YEAR, 6 MONTHS, 3 MONTHS



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GET MUCH MORE SPECIFIC ABOUT THIS YEAR

Fourth step. Is that right? 1, 2, 3, 4th step. Then you're going to get more specific about each year, and the question you want to be asking yourself is, "If I'm here in 5 years, where do I need to be in 4 years? Where do I need to be in 3 years? Where do I need to be in 2 years? Where do I need to be in 1 year? Where do I need to be in 6 months and 3 months?"

FIRST LOOKING AT THE GOALS, NOT THE HOW-TO AND BREAK IT INTO 4 QUARTERS AND STILL WORKING BACKWARDS

And kind of fill in the gaps that you noticed in the last step with goals that will be mileposts on the way to the stuff that's now living in your 5 year plan. You may discover in this process that the goals you have living in your 5 year plan are actually 3 year goals or you may discover that they're 10 year goals. Guess what? That's okay. If they're 10 year goals, ask yourself, "Where do I need to be in 5 years in order to be on track to get that goal in 10 years?" Get it?

So you're going to have created a timeline working backward, still working on the goals, 5 years, 4 years, 3 years, 2 years, and once you got that, then I want you to take the 1 year, 6 months and 3 months, and pull it out. So that you end up with a big timeline that the 5 years, 4 years, 3 years, 2 years that perhaps you put up on your wall.

I had one client who got this strip paper that was about 5 inches wide, and was, you know, in a big long 100 foot roll, and she put it around the...like the top of her walls, and she had her 5 years, 4 years, 3, like a timeline across along the top of her office wall. That was just up there.

And then she pulled the 1 year plan out and built it out into more of a poster board type format. So, what you want to do, again still looking at the goals, not the how-to, break it into 4 quarters, still working backwards. If you're here in 1 year, where do you need to be in 9 months? Where do you need to be in 6 months? Where do you need to be in 3 months?

CREATE A TIME-LINE FOR EACH GOAL

THIS CAN BE BROKEN DOWN FURTHER FOR COMPLEX GOALS SUCH AS THE TOURING SCHEDULE WHICH INVOLVES DIFFERENT AREAS LIKE BOOKING/SUBMITTING FOR FESTIVALS, PROMOTION VIA MEDIA, MERCHANDISING, LOGISTICS AND CASH FLOW

And then, you can break it out into even more detail for the complex goals, such as the touring schedule, which involves different areas like booking and submitting for festivals, promotions via media, merchandising, having the CDs for sale, logistics, cash flow, all of



those things. Where are they going to happen in that 1 year goal, in that longer term goal?

You can also then take your 3 months chunk, using the PDF that I teach you how to use in the [Project Management](#) call. Break that 3 month chunk out into the objectives or the action steps that are going to get you to the 3 month goal. So you notice, we're not doing action steps for anything further out than 3 months.

At most, if it's a really complex goal, you might do action steps for 6 months out, because you're brain has a hard time thinking about that. Now, I know that I have clients who booked their tours a year in advance, because they're playing some really big venues, and those big venues are booked out a year, 2 years, even 3 years in advance. That's okay. Your short term goal, your 3 month goal, is to have the "Fall 2010 Tour Booked." It's still a 3 month goal. And then your 6 month goal might be to have the "Fall 2010 Tour Contracts Signed."

Do you see where I'm going with this? So even though it's a goal about something that's happening a year and a half from now, you're still only looking at what you will have in 3 months or what you will have in 6 months. That's going to get you to that goal in a year and a half. Okay.

WORKSHOP IT

So now that I've gone over the process, I'd like to work with it a little bit more and more specific, and the first thing I want to do before...first thing, I need to take a drink of water...the first thing I want to do with you is work you through a process that will help you create the daydreaming and brainstorming.

So, if you are listening to this while driving, stop the tape now, because you can't do this while you're driving. You want to save this piece to listen to when you're in a place to really work the process.

So what you want to have in front of you: you want to have a safe space where it's quiet, and you won't be interrupted. You want to have a pen and paper ready to write when we're done with this process. You may want to have something to drink, and obviously you want to have this recording. So, go ahead and turn off the recording, go get the stuff that you need.



DAYDREAMING AND BRAINSTORMING – IN 5 YEARS, WHERE DO YOU WANT TO BE?

TRANCE WORK

Great, now you're back. Okay. Close your eyes. Sit up on your chair. If you can set yourself up in a position where you can easily drop your head back and have your head be supported, whether it's because you're sitting in a tall chair or lounge chair or because you have a pillow behind your head or you're...you've rolled your chair up against a wall, and you have a pillow behind your head, so your head is fully supported.

Close your eyes. Feel your feet flat on the floor. Uncross everything. Have your hands in an open and loose position on your thighs, closing your eyes, feeling the weight of your feet as they are standing on the floor, feeling the weight of your thighs against the chair, feeling the push of the chair against your back, against the back of your head, feeling relaxed as your eyes are closed, the weight of your lids are heavy as your eyes are closed.

And as you're sitting there listening to the sound of my voice, you know that you're able to go 5 years into the future. And as you step forward 5 years into the future, floating, floating forward, floating forward along the stream of time, feeling yourself floating forward along the stream of time, hearing the sound of my voice, knowing that you can project into the future, seeing yourself in 5 years. It is now 5 years from now. You are dropping into your body 5 years from now, opening your eyes in your body 5 years from now. Seeing what you saw, hearing what you will hear, seeing what you see, hearing the sounds, feeling the feelings in your body.

I want you to just look around and notice what you see. Notice what's around you. What's happening in your life as you look out? It is 5 years from now. What are you seeing? Who's there with you? What are you doing? How are you spending your day? What time are you waking up? How does your body feel as you wake up and step out of your bed? What are you seeing around you? What are you wearing as you step out from your bedroom into your bath? What are you seeing around you? What are you smelling?

What are you tasting as you're in the kitchen preparing your breakfast? Who's in your kitchen with you? Are you alone? Do you have others in your kitchen? What does your kitchen look like? Where is your kitchen located? What's next? What's first on your agenda? Who were you talking to? What steps are you taking? How are you spending your time? As you go through your morning, in this beautiful life that you have created for yourself, what's going on in your world?

As you begin to think about lunch, are you going out for lunch? Are you meeting friends? Is there a business meeting there for lunch?



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And what about your afternoon? How is your afternoon being spent in this day in your beautiful life that you have created? How are you spending your day? Who are you spending it with? What actions are you taking, easily and effortlessly? What brilliant opportunities are coming your way? What are you excited about?

What are you anticipating? What are you working on? What else are you excited about? What else are you anticipating? Who else is with you during this process? And as you walk through your afternoon, you notice that the sun is shifting, and you're starting to feel a bit hungry. So you start thinking about dinner, and what are you smelling? What are you tasting? Who are you spending your evening with in this wonderful life that you've created?

How does your body feel after this amazingly full and brilliant day? How are you taking care of yourself this evening? And as you move through your evening, and you begin to unwind and get yourself ready for bed, when you look back at this day, this beautiful day that you've created in this incredible life that you are living, what are you grateful for? How have you succeeded today?

What did you overcome, and what have you learned in this incredible day? Who do you appreciate? And feel yourself crawling between the crisp, fresh-smelling sheets and know that you are, in this moment, living the life of your dreams. And now, as you lift up from that time 5 years from now, and you begin to float back, notice that the stream of time is falling into place to make that reality happen on an unconscious level.

And as you come back into the present, into your body, in your chair, noticing how you feel, awake and rejuvenated, open your eyes and write down everything you saw. All of the goals that you've achieved, what you're working on, everything that is a part of your dream 5 years from now. Go ahead and pause this recording, and write down what you saw.

Great. So that should get you started on your brainstorming process. And I want you to take more time on this brainstorming process.

You might listen to that recording 3, 4, 5 times brainstorming, coming up with different things, noticing different things, having that day in the life be kind of a different day each time. You know, maybe one day it's you taking care of business and having a meeting with your team. Another day it's you performing or presenting.

Another day it might be you creating the product that you're creating, whatever it is, you know. Maybe it's a day with your family 5 years from now.

So each time you go through that process, you could be focusing on a different category in your life. A different area of your life and then sitting down and



brainstorming, jotting down everything you saw, everything that you have, and who you're being in that vision.

And so that becomes your goals, your brainstorming goals. Okay. So that's step 1 and again, step 2 should be a time completely separate. It may take you a week or two to finish this process. It may take you several sittings of an hour or two hours at a time to work through this process, that's okay.

ORGANIZE THE BRAINSTORMING – SIFTING AND SORTING

So this second step of organizing the brainstorm, you may decide that you want different colored Post It notes for each category. You may want different colored 3x5 cards for each category. Sift and sort. Write each of your goals that you decide you do want to keep on a different sheet, on a different Post It note or on a different 3x5 cards. Put them in order.

I RECOMMEND TAKING A BREAK OF A FEW DAYS BETWEEN THE FIRST AND SECOND STEPS. Now, I recommend that you do this step in one sitting because you're going to be spreading out. Right?

CREATE CATEGORIES OF GOALS THAT ARE CLEARLY LINKED

You're going to be spreading out to organize all of these steps into categories, into the categories that are clearly linked. Okay?

PUT THEM IN ORDER (IF I WANT A GRAMMY, THEN I'VE GOT TO RECORD MY CD FIRST)

And then also, you're going to take each of these steps and put them in order. So you may also want some rubber bands or binder clips to, once you get them in order, kind of, capture that. So that the next time you're working on this process, you're ready to jump into the next step.

DON'T WORRY TOO MUCH ABOUT DOING IT PERFECTLY

And again, don't worry about doing it perfectly. Don't worry if there seems to be holes in this. All you're doing is taking the brainstorming you did in the first step, putting each of those goals on a 3x5 card, and again, a goal is specific. It's measurable, and it's about having or being, not a doing. So it's specific. It's measurable. It's inspiring. It's visionary, and it's got a specific date on it. Okay?

And again, you may change those dates as you start working through your timeline. That's okay too. This is not...this step is not about getting it perfect. This step is just Organizing Your Brainstorming. Okay.



WORKING BACKWARDS CREATE A GENERAL TIME LINE

Step 3. Now that you've got your brainstorm organized, you're going to really fill it out, flesh it out, so that your 5 year goals have 4 year goals that really support them. That your 4 year goals have 3 years goals that fully support you getting to your 4 year goals. Your 2 year goals have...are well developed plan that will get you and lead to your 3 year goals.

THIS IS A TIME LINE OF GOALS – NOT HOW TO STEPS!

And again, remember these are goals, not how-tos. It's not about knowing how to get to these places. It's about identifying what the places are. Working backwards from 5 year, 4 year, 3 year, 2 year, 1 year, 6 months, 3 months. You may find that you stay in this step for a while. That's okay.

5 YEARS, 4 YEARS, 3 YEARS, 2 YEARS, 1 YEAR, 6 MONTHS, 3 MONTHS

You may come back to it more than once. That's okay. Set yourself up away to capture the work that you do, whether it's by making a pile of the 5 year goals and clipping them, and making a pile of the 4 year goals and clipping them or whatever, or you have a work area that can be undisturbed and you can keep coming back to it. It may take you several times of re-arranging things, adding stuff, re-assessing, "Is this really a 5 year goal? Is this really a 3 year goal?" That's okay. Remember, this is not about doing it perfectly.

And this is not about knowing, for certain, exactly what you will have when you will have it. I promise you, that when you start working on the short term, the 3 month goal, the 5 month goal, you start working through your time on this, you're going to discover that the stuff you thought was going to take 3 years arrives within 6 months. And you're going to discover stuff that you thought would take 6 months takes 3 years. That's okay!

You're just making a plan. You are telling the universe this is what I want to create and to the best of my knowledge this is...these are the mileposts that will put me on track. You may discover a year from now that you are already at your 5 year goals, and you don't even really know how that happened. That's okay too. I mean, seriously, would you mind?

Isn't it okay if it doesn't work out exactly as you thought? You might, 3 years, from now discover that what you thought was your definition of success wasn't actually. That's okay too. Because this is all about the journey. This is about you living true to yourself and true to your dreams, moment to moment.



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GET MUCH MORE SPECIFIC ABOUT THIS YEAR

So, step 4. You're going to get much more specific about this year. I recommend you do this step at the beginning of every year. That you re-assess your 5 year plan. You maybe shuffle some things. You create some new mile posts for the new 5 year, because you know, here it is, June of 2009, for example, or March of 2009, and you're making a goal for March of 2014 to the best of your knowledge.

But in December or January of 2010, you may be much clearer on what's happening in 2014, and it's time to also create your plan for 2015. You see how this works? Now, get much more specific about this year. Looking at the goals again, not the how-to, breaking it into quarters, and working backwards. If I need to be here, at the end of this year, in order to be on track for my 5 year plan, where do I need to be in 9 months? Where do I need to be in 6 months? Where do I need to be in 3 months? Still looking at the goals, not the have-tos, how tos or what to do dos. You'll do that in a minute.

FIRST LOOKING AT THE GOALS, NOT THE HOW-TO AND BREAK IT INTO 4 QUARTERS AND STILL WORKING BACKWARDS

Step 4, looking at the goals for this year, breaking them into 4 quarters, working backwards. And finally, looking at the goals in 3 months or 6 months at most and creating your PDR. Your performance, your...I forget what PDR stands for, forgive me. Going to the...if you haven't yet, listening to the [Project Management](#) class, so that you learn how to do a PDR, downloading the [PDR](#), um, Microsoft Word document. I put it up there in a Word document, because it should be something that you can create on the computer easily.

CREATE A TIME-LINE FOR EACH GOAL

USE YOUR PDR – IF I GET THESE OBJECTIVES, I WILL HAVE THIS GOAL

IF I TAKE THESE ACTIONS, I'LL REACH THESE OBJECTIVES WHICH WILL GET ME TO THIS GOAL.

Answering the questions, "If this is my goal, what objectives do I need to reach in order to have this goal? If these are my objectives, what actions do I need to take in order to reach these objectives?" Again, always working backwards from the big picture down to the small picture. Chunking down, chunking down, chunking down. Okay.



AFTER YOU'VE DONE THESE STEPS THERE IS ONE LAST ONE BEFORE YOU PUT THIS PLAN INTO ACTION. SIT BACK AND REALLY ASK YOURSELF – IS THIS WHAT I WANT?

IS IT? IF THE ANSWER IS UNEQUIVOCALLY YES, THEN YOU HAVE ONE MORE QUESTION: One last step. After you've done these steps, there's one last step before you put this into...plan into action. I want you to sit back and really ask yourself, "Is this what I want?" Is it? If the answer is unequivocally, "Yes!" Then you have one more question: "What will it take to create this? What will the cost be?"

WHAT WILL IT TAKE TO CREATE THIS?

WHAT WILL THE COST BE?

AND FINALLY – ARE YOU WILLING TO DO WHAT IT TAKES TO CREATE THIS? ARE YOU? And finally, are you willing to do what it takes to create this? Are you? Are you willing to do what it will take to create this, and this question is probably one you will have to answer over and over and over, because you may come up against your internal fears, your internal considerations, and you will need to find that place inside of yourself, where you are committed to this life.

AND THIS QUESTION IS PROBABLY ONE YOU WILL HAVE TO ANSWER, OVER AND OVER AND OVER AGAIN.

You are committed to this vision, this dream. You are committed to these goals, and you know what, the funny thing about commitment? It's really all a commitment is is making the choice, answering the questions, "Yes I am willing". Yes, over and over again.

BECAUSE YOU MAY COME UP AGAINST YOUR INTERNAL FEARS AND CONSIDERATIONS – AND YOU WILL NEED TO FIND THAT PLACE INSIDE OF YOURSELF WHERE YOU ARE COMMITTED TO THIS LIFE. YOU ARE COMMITTED TO THESE GOALS. AND YOU ARE WILLING TO FACE YOUR FEARS, ASK FOR HELP, AND GET INTO ACTION.

I am willing to face my fears, I am willing to let go of my considerations or to take care of myself, so that these considerations get taken care of. I am willing to face and deal with whatever obstacles show up and figure out a way to get around them. I am willing to ask for help when I need it, and I'm willing to get into action now. Get into action now.