Create the Plan-How to Create the Plan

Toolbox Teleclass Transcription

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S.P.E.C.I.A.L Road Map to Success – 7 Steps Taught in Detail

Track 1: See Your Future: Create Your Business Vision, Career Goals & Plan

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INTRO

Welcome to the Foundation Program Toolbox Teleclass: How to Create a Plan. Now if you haven't yet listened to the S.P.E.C.I.A.L. Road Map to Success, I want you to stop right now and go listened to it.

And I'm planning on recording at this time, I'm planning on recording class for the first 3 steps, and if those classes exist, I recommend listening to those classes too before you listen to this class.

PUT IT INTO CONTEXT OF SPECIAL ROADMAP — STEP 4

This class builds on the S.P.E.C.I.A.L. Road Map to Success. So just to remind you, if you listened to it a while ago, the 7 Steps are S for Starting Point Assessment, P - Picture the End Result, E - Explore Creative Ways to Get There, C - Create the Plan, and that's what I'm going to be teaching you tonight. I - Implement the Plan, A - Assess and Adjust and L - Love the Results.

WHAT IS A PLAN AND WHY DO WE WANT IT?

So what is a plan and why do we want it? Now I do want to differentiate. This is not about creating a business plan. There's another class about that. This is about creating a plan for any goal that you've set. Any project that you're working on.

This is how you create a plan to achieve that goal, complete that project, whatever it is. So what is a plan and why do we want it?

WIKI - A PLAN IS TYPICALLY ANY DIAGRAM OR LIST OF STEPS WITH TIMING AND RESOURCES, USED TO ACHIEVE AN OBJECTIVE. IT IS COMMONLY UNDERSTOOD AS A TEMPORAL SET OF INTENDED ACTIONS! THROUGH WHICH ONE EXPECTS TO ACHIEVE A GOAL.

According to Wikipedia, god, I love Wikipedia...According to Wikipedia, "...a plan is typically any diagram or list of steps with timing and resources used to achieve an objective.

It is commonly understood as a temporal set of intended actions through which one expects to achieve a goal." So you've got actions, a list of actions. You've got times associated with each action, and you expect if you accomplish each action, you will achieve your goal.

IT MAY INCLUDE STRATEGIES AND TACTICS

It may also include strategies and tactics. In most cases, and this is a quote from Wikipedia. not from me, but I agree. In most cases, the absence of a well laid plan can have adverse effects. For example, a non-robust project plan can cost the organization time and money. Uh, yeah?!

IN MOST CASES, THE ABSENCE OF A WELL-LAID PLAN CAN HAVE ADVERSE EFFECTS: FOR EXAMPLE, A NON-ROBUST PROJECT PLAN CAN COST THE ORGANIZATION TIME AND MONEY.

WHY DO WE WANT A PLAN?

That's kind of why I'm teaching you this class. So why do we want a plan? What does a plan really give us?

A PLAN FOCUSES YOUR ACTIVITIES

A plan focuses your activities. A plan allows your brain to filter for opportunities. So the first statement I think is fairly obvious. A plan focuses your activities. In other words, you know what to do first, what to do second, what to do third.

A PLAN ALLOWS YOUR BRAIN TO FILTER FOR OPPORTUNITIES

So it gives you a clear focus for what you're working on right now. A plan allows your brain to filter for opportunities. Here's what I mean by this: the funny thing is that when you tell your brain that you are looking for something, thinking about something, working on something, it immediately starts filtering for that.

So you might notice...I remember back a few years ago, I decided that...I saw a commercial or something, and I decided the Mini Cooper was just the cutest car ever, but until I saw that commercial, I had not really noticed those cars.

But I saw this commercial and I thought, "Wow! That is an adorable, cute, little car," and then for the next like 3 weeks, I saw them everywhere. All of a sudden, they are all around me. I was seeing Mini Coopers out in parking lots, on the road, in film and television. I mean I was just seeing them anywhere. Now, I'm not saying that before I saw that commercial the Mini Cooper didn't actually exist in my neighborhood.

But what happened was when I saw the commercial, and I became conscious and aware and also admiring of the car, I started filtering for them, and I started noticing them in the bustle around me.

See the thing is that your brain is processing millions and millions of bits of information at any given second. There's no way, if you actually paid attention to all those millions bits of information coming into you via your 5 senses, through your thoughts, all of that,

there's no way you could actually function if you are paying conscious awareness to all that information.

One of your brain's primary jobs is to filter all this data and decide what's important, and when you create a goal, and even more so create a plan to achieve that goal, you're brain starts specifically filtering for resources, opportunities, information about that goal. It's just going to seem like it's showing up all around you.

And the truth is that information, those opportunities have always been all around you, you just haven't been filtering for it. So having a plan, having a specific goal, and having a plan to achieve that goal allows your brain to filter for opportunities that are going to support you in achieving that goal. Okay?

A PLAN WILL KEEP YOU MOVING FORWARD THROUGH FEARS, CONSIDERATIONS AND OBSTACLES, (REMEMBER FROM JACK CANFIELD'S THE SUCCESS PRINCIPLE)
A plan will keep you moving forward through fears, considerations, and obstacles. Now and I've talked about this, I think I talked about this actually in the Goal Setting call. There's a wonderful book by Jack Canfield called *The Success Principle*.

And in the chapter on Setting Goals, he said something that I think is absolutely brilliant, which is that when you set a goal that is really a good strong goal for you, it stretches you a little bit. It's in line with what you want in your life. It's you know, going after something serious. You will be confronted by fears, considerations, and obstacles.

And in fact, he says if you're not being confronted by fears, considerations, and obstacles, either you're not setting goals or you're setting really wimpy ones. So if we know that when we set a goal, that we're going to be confronted with fears, considerations, and obstacles, as soon as we set a plan, we can say to those fears, "Yes, I know this is scary, and we've got a plan."

We can say to those considerations, "Yes, I know. These are concerns, and these are possible distractions or prioritizing these goals over that stuff is you know…may have consequences, but I've got a plan for that."

And when we hit obstacles, and I promise you, it is inevitable. You will hit obstacles. There's a name for that. It's called Life, and if you're doing anything, any consequence in your life, you're going to hit obstacles.

It's the nature of the beast. Again if you're not hitting obstacles, I'm betting you're not going after big enough goals. Okay? But if you're hitting obstacles and you've got a plan, it becomes much easier to deal both emotionally and pragmatically with those obstacles, because you know what, so what? It's an obstacle. You've got a plan.

Or this plan, this piece of a plan isn't working out the way you thought it would. Well, let's adjust the plan. What happens when you hit those obstacles and you don't have a plan is very often you end up throwing out the baby with the bath water.

You hit that obstacle, and you give up on the goal, because you don't have a plan. A plan is going to pull you through the fears, considerations, and obstacles. And if one of the considerations are family or relationships issues, very often when that family member, that loved one brings up, "But you're not spending enough time with me" or whatever it is, you can show them the plan.

You can enroll them in the plan. If you've got a plan, they're going to take you more seriously. And I think be more supportive. That's what I feel.

A PLAN ALLOWS YOU TO WORK FORWARD IN INCREMENTAL STEPS WHICH
Reduces overwhelm and stress
A plan also allows you to work forward in incremental steps, which one, reduces overwhelming stress. One of the bits of wisdom from one of my teachers is overwhelm is caused by focusing too broadly.

If you got a plan, you can afford to narrow your focus to just this one little bitty piece of the plan that you're working on today. Because you don't have to worry about the rest of the plan, you've got it documented, and when it's time to focus on that stuff, you will. So you can let it go, and you can just focus on this piece that you're working on today and trust that the plan is there, you know, the plan has your back if you will.

Allows you to work on more than one project without losing your place
So a plan, also in those incremental steps, allows you to work on more than one project without losing your place. So for example, if you've got 3 projects in the hopper, and you're working on step 1… step 3 for project A, step 15 for project B, step 6 1/2 for project C, and today you're going to spend 2 hours on project A and 3 hours on Project B.

What if you don't finish step 6 for Project A? In your plan you're making note of where you were when you left off, and then tomorrow when you come back to project A after working on Project B and Project C, you don't have to try and figure out where you left off. It's right there. It's part of your plan.

Which also will free up your RAM, your brain, your creativity to work on Project B, because you can completely let go of Project A until it's time to come back to it, because you know that the plan is holding your place, okay?

So this is going to reduce your overwhelm and stress. It's going to empower you to juggle more than one thing in your life at a time, and I know even though I always

recommend serial monogamy when it comes to big plans, the truth is if you're a business owner, and if you're listening to this call, you are a business owner.

If you're a business owner, you've got a bunch of different things going on all at once. It's the nature of the beast, of course you do. Okay? So having plans in each area is going to really help you manage that and keep all the plates spinning.

Allows you to delegate pieces of the project without abdicating your accountability

And finally a plan allows you to delegate pieces of the project without abdicating your responsibility and your accountability, because part of what I'm going to show you how to do is figure out who you are delegating it to, and you can then of course create points in the plan when you check back in with those people. Okay?

And I'm going to talk a bit more about how that works. And also, if you want to know more about how to delegate, definitely listen to the Create Systems class, and I think How to Manage a Team is what it's called. And I will of course put links to those up on the call recording page. Okay.

MOST PEOPLE MAKE TWO PRIMARY MISTAKES WHEN PURSUING A GOAL:

KEEP THEIR PLAN IN THEIR HEAD INSTEAD OF ON PAPER (OR DIGITAL)

So, most people make 2 primary mistakes when pursuing a goal. The first mistake…this is really common…is to keep their plan in the head instead of on paper or on your computer.

INCREASES STRESS AND OVERWHELM

Keeping the plan in your head increases your stress and overwhelm because you have to remember it. You have to remember it. You have to remember all the pieces that are going on with it.

You have to remember where you're at with the different pieces. You have to remember all the people that you're waiting for a response from on all those pieces. All this stuff clutters your brain.

And the more crap you've got going on in your brain, the less room you have to be creative. I'm going to say that again, because I know you guys are all creative people. That's why you're part of this academy and participating in listening to this class.

The more you've got going on in your head, the less room you've got for creativity. So get it down on paper.

REDUCES YOUR ABILITY TO REALLY SEE THE BIG PICTURE
In addition, keeping your plan in your head reduces your ability to really see the big picture.

Because if you're focusing on the big picture, you lose the details. If you're focusing on the details, you lose the big picture. The plan allows you to focus on the details while holding the big picture, because the details are all written out in the plan.

So you're not trying to remember them all.

MAKES YOU LESS FLEXIBLE IN THE FACE OF FEARS, CONSIDERATIONS AND OBSTACLES
Holding the plan in your head makes you less flexible in the face of fears, considerations, and obstacles, because, "Oh my God if I have to change this, what else has to change?"

If it's all in your head, you have to figure it all out in your head. If it's on the page, you can look at the page and adjust where you need to.

REQUIRES YOU TO WORK ON IT ALONE – NO ONE ELSE CAN HELP BECAUSE IT'S ALL IN YOUR HEAD
Keeping it in your head requires you to work on it alone, because no one else can help because it's all in your head.

You can't give pieces away because it's all in your head. In order to give something away, you have to somehow document it. Teach someone else what you want them to do, and having a plan on paper allows you to do that much more easily.

ALMOST GUARANTEES THAT YOU WILL FORGET SOMETHING (UNLESS YOU HAVE AN EIDETIC MEMORY)
Keeping it all in your head almost guarantees that you're going to forget something. That something is going to fall through the cracks unless if you have an eidetic memory. And even if you do have an eidetic memory, and you kind of can't help remembering everything, I still say put it down on paper.

DOESN'T ALLOW YOU THE SEE THE FLOW OF ACTIVITY TO DECIDE IF YOU REALLY SHOULD BE DOING THESE THINGS IN THIS ORDER
It's much easier to rearrange things on paper than it is rearrange things in your brain. And finally, keeping the plan in your head doesn't allow you to see the flow of activity to decide if you really should be doing these things in this order or if maybe it makes

sense to put that in place first, and you know, it doesn't…it just doesn't allow you that flexibility because you can't see the whole thing all at once.

ACT WITHIN THE BOX OF YOUR CURRENT LEVEL OF SUCCESS AND REALITY

The second mistake that people make when pursuing their goal is that they act within the box of their current level of success in reality. The essence of pursuing a goal that takes your business, your life, you career forward and upward is that you have to step outside of your box.

So again I mean, if you're just setting goals around staying inside your safe little box, yeah, okay fine, but you're not going to get anywhere with that. If you're setting goals that pull you forward on the path of your career towards the life of your dreams, then you've got to act outside of your box, right?

A GOOD PLAN REQUIRES RESEARCH, BRAINSTORMING, AND ASKING EXPERTS FOR SUGGESTIONS – OUTSIDE OF YOUR BOX!

See, a good plan requires research, brainstorming, and asking experts for suggestions that allow you to step outside of your box.

And as I said in the description of this class, you know, you don't know what you don't know until you go and research and find out. So having a plan is going to empower you to do that research and find out what you don't know, and then make a plan to learn it.

EINSTEIN'S DEFINITION OF INSANITY – KEEP DOING WHAT YOU'VE BEEN DOING EXPECTING DIFFERENT RESULTS

I'm sure you guys have heard Einstein's definition of insanity. That's doing what…you continually do what you've been doing and expect different results? See, what you've been doing has gotten you the results you've got so far. They might be great.

But if you got goals to move you forward, then clearly there's more that you want. If you keep doing the same things that you already know to do, you're not going to move forward. You're just going to keep creating the same results.

So you've got to stretch outside of the box of your current reality, your current success.

A PLAN LAYS OUT SPECIFICALLY WHAT YOU WILL BE DOING DIFFERENTLY

A plan lays out specifically what you will be doing differently in what order and when.

THINK WITH LIMITATIONS ON YOUR OPTIONS – BLACK/WHITE THINKING

Another problem within the same mistake is that, you know, people think with limitations on their options. You know, it's either black or white. There's only one way to get, you know…there's only one way to get to your goal.

The truth is there are an abundant of different options, different solutions, different actions, different strategies and tactics in pursuing any goal. So be aware, be cognizant of the ones that you've dismissed without consideration.

And I'm going to talk more about that as we break down actually how to make a plan.

A GOOD PLAN WILL REQUIRE YOU TO INVESTIGATE ALTERNATIVE OPTIONS, EXPANDING YOUR OPPORTUNITIES, STRATEGIES AND TACTICS
A good plan will require you to investigate alternative options, expand your opportunities, strategies, and tactics.

There must be a segment in your plan about research, because if you already knew everything you needed to know in order to get your goal, you'd probably already have your goal.

Now that research may be on internal stuff, because if you know in your head everything you need to know in order to get your goal but you're not taking those actions, then there's something else going on, and so you need to do some internal research and overcome those internal obstacles.

WHAT STOPS PEOPLE FROM MAKING A PLAN USUALLY?
What stops people from making a plan usually? Now obviously everybody is different, and anything I'm going to tell you here is based on my experience, and your experience may be different and what I would recommend is if it is and you're looking for some solutions, hit me up in the Ask Coach Debra call, and I'll be happy to help you.

THEY TRY TO MAKE A PLAN APPEAR FROM NOTHING AND GET QUICKLY OVERWHELMED, UNCERTAIN, AND FREAKED OUT.

THEY DON'T WANT TO THINK ABOUT HOW MUCH WORK REALLY ACHIEVING THEIR GOAL IS GOING TO TAKE — MAYBE IT WON'T BE SO HARD IF THEY JUST DON'T LOOK AT IT AND DIVE INTO ACTION, WHO KNOWS, RIGHT?
The first one is that they try to make a plan appear from nothing and get quickly overwhelmed, uncertain, and freaked out. I mean think about it, if you set a goal and sat down and tried to make a plan, particularly if it's a goal that you've never attempted before, because again, you don't know what you don't know. And if you try

to make a plan, and there's a lot of stuff you don't know, it's really easy to get freaked out and overwhelmed.

So that might stop you from even making a plan that includes figuring out what you don't know.

The second thing that often stops people from making a plan is they don't want to think about how much work it's really going to take to achieve their goal.

You know, maybe it won't be so hard if you just don't look at it and you dive right into action. I mean, who knows, right? In my experience, if it didn't take a lot you'd already have it.

So if you're pursuing goals that you know are big, and I love that, then you've got to accept that it's going to take doing things you've never done before, taking risks, confronting your fears, considerations, and obstacles, right?

Learning skills, stretching yourself out of your comfort zone, perhaps living in the unknown a bit. There's work to be done. Not planning that work actually will make more work for you, because you're going to make mistakes that having a plan would enable you to avoid.

You're going to set something up and realize, "Oh my God, this isn't going to work because I don't have that other thing in place." But if you create a plan, you would have seen that you needed that other thing in place first, and so you wouldn't have wasted the time energy and money, and not had it work and having to back track and all of those frustrations and mistakes.

IT FEELS LIKE A WASTE OF TIME — WHY SPEND ALL THIS TIME CREATING A PLAN — WON'T YOU GET TO THE GOAL FASTER IF YOU JUST GET INTO ACTION?
Trust me. Having a plan will save you time, energy, and money, which leads me to the third reason that most people don't make a plan. And that's because it feels like a waste of time.

I just had this conversation with a client this week. "Why spend all this time creating a plan? Can't I just jump in? Can't I just get into action? This is…I don't want to make a plan. This is frustrating."

The truth is that it may feel more satisfying emotionally to just jump into action. I promise you. You will be more successful in the long term with more predictability, spending less time and energy, wasting less money, if you have a plan.

It is so worth the time and energy. So let's get down to brass tack. Shall we? How do you create this plan I'm talking about?

HOW TO CREATE THE PLAN

YOU MUST DO STEPS 1, 2 AND 3 FROM THE SPECIAL ROADMAP TO SUCCESS IN ORDER TO MAKE THIS METHOD WORK

So the first thing is that you must, must, must do Steps 1, 2 and 3 from the S.P.E.C.I.A.L Road Map to Success in order to make this method work. This method is built on those three things happening first, okay?

So let me review quickly, and I again recommend listening to all of the accompanying materials for this.

STEP 1 – STARTING POINT ASSESSMENT –

Step 1 is the Starting Point Asseessment. This is where you figure out where you're at, what you've currently got in place, what's working, what's not working, all of that stuff.

YOU WILL FIND THAT THE MORE YOU DO TO ESTABLISH WHERE YOU'RE STARTING FROM THE CLEARER YOU WILL GET ON ALL THE THINGS THAT YOU NEED TO DO TO GET TO THE GOAL.

You will find that the more you…the more you do to establish the reality of where you're starting from, the more you investigate this piece, the clearer you'll get on all the things that you need to do to get the goal. In fact, as you're making the list of the things you've already got in place, you brain is going to do something like this:

"Well, okay. I've got a website, but you know what that website is missing da...da...da...da...da...Well, I've got these songs but you know, this song is okay, but that song is only three quarters finished, and da...da...da...da... "

So because your brain is saying, "Oh you're interested in this stuff. Let me provide you more information." That's its job. That's what it does. That's okay.

AS YOU'RE DOING THE STARTING POINT ASSESSMENT, IN A DIFFERENT FILE, JOT DOWN THE IDEAS, THOUGHTS, PROBLEMS, GAPS THAT OCCUR TO YOU.

In a separate document, and I prefer Excel for these kinds of things, and I'll tell you why in a bit, but in a separate document just start making a list of all the "yeah buts" that come up for you as you're establishing your starting point.

"Well I got this piece, yeah but you don't have that piece." Great, put it down on the list. "Well I got this piece, yeah but it's not in good shape." Great, put it down on the list. "But I've got this piece but yeah...but" right? So you get this. That's going to happen naturally, so just jot it down on a separate document, and you can even label that document, "The Beginnings of Step 3"...Or "The Beginnings of Step 4 - Creating the Plan." Just start recording it. Don't get into action on that stuff.

Just start jotting it down. So that's Step 1 okay.

STEP 2 – PICTURE THE END RESULT

HAVING YOUR VISION WILL HELP YOU TO EVALUATION THE INFORMATION YOU DISCOVER IN STEP 3 AND DETERMINE WHICH ACTIONS WILL ACTUALLY LEAD YOU TO YOUR GOAL (AND WHICH ONES ARE JUST DISTRACTIONS)

Now Step 2 is Picture the End Result. Again, there's an audio Master class called Create Your Vision, which is all about this step and I will include a link to that in this class post.

STEVEN COVEY – BEGIN WITH THE END IN MIND.

Having your vision, picturing the end result. As Steven Covey said, "Beginning with the end in mind" will help you to evaluate the information that you're going to be discovering in step 3.

And determining which actions, which ideas, which resources, which opportunities will actually lead you to your goal, and which ones are maybe for a different goal or a different time or really are distractions and you should not do it at all. Okay?

So that's why creating your vision is critically important. It's also going to enable you to get past obstacles, because the clearer you are on where you want to end up, the more specific and visceral that is, the more empowered you will be to move through the fears, considerations, and obstacles that come up for you.

STEP 3 – EXPLORE ALL THE WAYS TO GET THERE

Now let me talk about step 3, because step 3 is where you gather all the ingredients that you're going to turn into your plan. This is why you're not actually sitting down and writing a plan out of nothing. Okay?

This saves that experience. You won't have that experience because of this step. In step 3, you're exploring all the ways to get there. And I mean ALL the ways to get there. The idea with step 3 is that you cast your net really, really wide, because in step 4 you're going to edit.

THIS IS THE BIG ONE – IT IS FROM THIS STEP THAT YOU WILL GET THE RAW DATA FOR YOUR PLAN

Don't edit in step 3. Explore all the ways to get there. This is the big one. It is from this step that you will get all the raw data you need for your plan.

RESEARCH:

**in this step you are interviewing people who are where you want to be
Reading blogs, books, videos, classes – for how to get to where you want to be.**

First piece of this is research. In this step, you'll be doing things like interviewing people who are already where you want to be, interviewing experts in your area, reading blogs, books, videos, watching videos, taking classes, listening to mp3s, doing all the research and learning.

This is the step, if you need specific training to achieve your goal, this is the step where you'll pursue that training. Okay? This is all the steps for how to get to where you want to be. Okay? And as you're doing all of that research you want to be putting the actions that people suggest, that people recommend, that books suggest, that videos recommend, all of that stuff, all of the how tos, you want to be jotting them down into that file that you started in step 1. Just dump stuff in there. Again, no editing.

BRAINSTORMING:

The second part of step 3 is brainstorming. This is when you access your own internal wisdom. My guess is if you set this goal, you've probably already been doing a lot of thinking and dreaming about having this goal in your life.

Writing down ALL the possible things you could do to get you closer to your goal

You probably have a list of actions that you think you should take in order to achieve this goal. Put them all down into that big list. Just jot them all down. Write down all the possible things you could do to get closer to your goal.

Now remember, the essence of brainstorming is you put down every single idea you could possibly come up with no matter how stupid, no matter how far-fetched, no matter how ridiculous or clownish it makes you feel, even thinking about the possibility of doing it. Put it all down.

Put it all down into that list. You're not committing to anything, right? This is just making that big list. Getting all the data together that's going to go into creating the plan. Allow yourself to be creative without filtering, editing, or critiquing your ideas. No ideas are off limits in this stage.

Even if you think it's something you would never do. For example, if you say, "Okay, I'm not a performer. I'm not going to perform live," but if it comes up for you to perform live as an idea for how to pursue your goal, write it down. You're not committing to anything.

If you think, "Boy, I could stand naked on the street corner with nothing but a clapboard in front of me and behind me covering my private parts with the statement, "Buy My CD" on it, put it down on the list. I don't care.

It doesn't have to be anything you would ever do. If it occurs to you, it goes on the list. I recommend when you're brainstorming that you push through that moment, that sensation of, "Oh my God, I can't possibly think of anything else," at least twice before you stop brainstorming. At least twice, push through. It doesn't matter if you repeat ideas. It doesn't matter, because the more you push through, the more freedom you give your brain to really be creative with this process.

And the more likely you're going to get some genius ideas out of it. So let yourself repeat. Let yourself be silly. Be stupid. Be ridiculous. Let yourself put things down that you would never do in a million years.

It all goes down onto this list. Another thing that you can do is get together with community to do brainstorming. So if you have other people in your life who are supporting you in your goals, ask them to help you brainstorm. Ask them for ideas and again without editing. Just jot them done. Type them up, record them, whatever.

Allow yourself to be creative without filtering, editing or critiquing your ideas
Get with others and ask them to help you brainstorm
Get all of their ideas, all of their suggestions for ways you could pursue this goal. Put them all down on the list. Talk to experts. Talk to people who are already there. Get all their brainstorm ideas for how you could get this.

Ask the questions on Facebook or Twitter, "I'm pursuing this goal. Anyone have any ideas for how I can do it? Any ideas for resources or classes or anything?" Ask the questions. You lose nothing by asking.

YOU WANT TO END THIS STEP WITH A BIG LONG LIST OF POSSIBLE ACTIONS, IDEAS, LEADS, RESOURCES
Now you want to end this step with a ridiculously long list of possible actions, ideas, leads, resources, opportunities. Really, really, really long. I'm talking about hundreds of items on this list.

Now, the next step is to actually take this big long list and create the plan. Okay? When you're creating the plan, you're going to take all the ideas of action steps that you started to come up with in step 1, together with all the ideas you came up with in your research and brainstorming in step 3 into a big pile either physically or in Excel.

STEP 4 – CREATE THE PLAN

PUT ALL THE IDEAS OF ACTION STEPS YOU STARTED TO COME UP WITH IN STEP 1, TOGETHER WITH ALL THE IDEAS YOU CAME UP WITH IN STEP 3 INTO A BIG PILE – EITHER PHYSICALLY OR IN EXCEL
Now if you have trouble with spreadsheets and you're really tactile, go ahead and put your ideas on 3x5 cards and start shuffling them, okay?

Why I like excel
But I like Excel and I'll tell you why.

In Excel, it's much easier to rearrange things. If you're just writing a list on a piece of paper, you're going to be erasing and deleting and crossing out and rewriting, and it's going to end up looking like a big, fat mess.

Whereas you can do that in Excel just by cutting and pasting, by sorting, by re-organizing a million different times. And what I recommend is that you do this in columns, so that your list of ideas are in a single column. Each idea is its own row. Okay?

START ARRANGING THEM IN A LOGICAL ORDER
So don't put each idea in its own column. Put each idea in a row in a single column, and just start arranging them in a logical order. "Well I need to create my website before I start pointing people to my website from my social media." So let's put that Create Website above Creating the Social Media or whatever, right?

REMOVE TO ANOTHER LIST (DON'T DELETE) ANY ACTIONS THAT FEEL LIKE THEY ARE
So just put it in a logical order and while you're doing this, I want you to start removing to another list. Don't delete. Don't ever delete stuff, even if it's the really ridiculous, silly stuff, but remove to another Excel list, and you might keep it. You might make another spreadsheet within the same document. You know you can have multiple spreadsheets inside a single workbook in Excel.

You might put it in a different document altogether, up to you.

Out of the scope of this stage of the goal
But start moving things out of this list that feel like they are out of the scope of this stage of the goal. So if you've got a 5-year goal in this particular area, some actions may be

further out than what you're trying to accomplish with this piece of the project, with this 3-4 months stint of the goal. So if it's out of the scope, put it on another sheet.

Kinda crazy and out of your comfort zone for now (or forever)

If it's kind of crazy, out of your comfort zone for now or possible forever, take it out. And again, don't delete it. Just put it on the other list.

Seem interesting but feel like they pull you off track of the goal as you've envisioned it

If it's seems interesting, like intriguing, and it might be a good idea, but it feels like it's pulling you off track of the goal as you've envisioned it, take it off the list.

So that you end up with an arranged list of action items that are…seem to be arranged in a…what seems to be a logical order, and you know what, if it seems like you know, it's arbitrary whether you do this thing first or that thing first, that's fine. Leave it arbitrary.

I think it will be clear for you as you start moving through the project which one really should be happening next. That you know, one thing about plans that I've found is you make the best plan you can, given the information you have at the start of the project, and step 6 if you remember is Assess and Adjust. This plan your making is a living document. You're always going to be re-arranging it and reordering it and putting new dates and all that stuff.

Don't worry about that too much. If something feels like they all kind of need to be happening around the same time, just put them in some relatively logical order.

BREAK OUT LARGE STEPS INTO SMALLER PIECES OR EVEN INTO SEPARATE ACTION PLANS (E.G. CREATING THE WEBSITE)

Break out any big chunk projects either into smaller pieces within the same document, or possibly if it's a really big project, you might want to break that into its own plan and just have the overall plan in the, you know…the overall title of the project in this bigger plan, because it's part of the process, but like for example, building a website is one of the things that you need to do in order to achieve your goal. Well, that all by itself is a project.

So you're going to leave Create the Website in this plan, because it feeds into the plan, but you probably will create another plan for that project. because it's too big, you know. It's a big chunk of a project, and you will benefit from breaking it out into bite size pieces in a plan, okay?

So this plan, this document may end up having multiple spreadsheets, so you know, you might actually break it into another spreadsheet within the same document that is you know, the website plan. Okay?

Once you've got your list edited, in the right order, the big projects broken out, either broken out into their own plans or broken out into individual steps. You know, if a piece includes 3 or 4 steps, I would keep it in and just make sure that when you're describing the step that you also name...so like let's say "Create Your Marketing Package" is one of the pieces, and maybe there's within "Creating your Marketing Package," maybe you need to create your one sheet. You need to pick up the physical packaging for the marketing package. You need to have a new head shot done and a new business card.

Those are the pieces, you know, it's only 3 or 4 pieces. You would break them out within this one plan. I don't think you necessarily need a separate plan for it, but in the Excel document say, "Marketing Package Business Card," "Marketing Package One Sheet," "Marketing Package Head Shot," because you're going to be resorting and resorting this plan, so you want to make sure that you remember what this piece was for. Okay?

ONCE YOU'VE GOT YOUR LIST EDITED AND IN THE RIGHT ORDER — CREATE YOUR PLAN
Now once you've got your pieces edited and in the right order, now is the time to fully trick out and create your plan, because a plan without dates is not a plan. It's just a to-do list. It's not a plan.

Put it into excel with the following columns:
Time Est.
Start Date
Due Date
Total Cost
Delegated to
Status
Notes
A plan includes the following: so what I recommend is in this Excel document, even if you've done the brainstorming, the arranging, the figuring out of the order of items using a physical system with like post-it notes or 3x5 cards or even a whiteboard, I so strongly recommend that you transfer it into an Excel document, and I'm going to tell you...you're going to understand why in a minute.

In this Excel document, the first column are the tasks. You want the following columns additionally: Time Estimate, Start Date, Due Date, Cost, Total Cost, Delegated To, and Status.

Time Estimate means how many hours of solid work, not how many weeks, but how many total hours. If you think it's going to take you 30 hours to do a project, put in 30 hours, okay? How many hours do you think it's going to take you to do this action? And I think that if any action really is more than 4-6 hours, I would break it out into smaller pieces, because it's probably too big. Okay?

Even if it's you know, creating a new file organization system, and the pieces are A-J, J-P, K-P, O-S and T-Z are the separate pieces, and each one is going to take you 2 hours, find a way to break it out, okay? Just because it's going to make it easier for you.

A Start Date: when do you need to start this project by? A Due Date: when is this project…will this project be completed by? What's the cost? Who is it delegated to? Put your name if you're doing it, and Status. By Status I recommend you do a percentage, because if it's, you know, zero percent done that means you haven't started it yet.

If it's 10%, if it's 30%, if it's 80% because that's also going to help you adjust the time estimate. It's going to help you adjust the due date if you need to, like that. Now, fill in the time estimated column first.

Fill in the Time Estimated column first
If you're not good with this skill – start with triple the amount of time you think it will take
If you're not good at estimating how long some things are going to take, take a good guess and triple it. If you think, "Uh, I think this will take me about 2 hours," put in 6. I'm serious. Triple it. It's a happy problem if it takes you less time.

It's not a happy problem if it takes you a lot more time, so start by tripling it and as you get into that task, you're going to get a better idea, and you just adjust it if you need to.

Fill in the Start and Due dates
Keep in mind how much time you really have in a typical week to devote to this goal
So you fill in the time estimate column first. Then you fill in the Start and Due Date.

So here's the thing about the Start Date and the Due Date, keep in mind how much time you really have in a typical week to devote to this goal, and don't assume. Don't put yourself into a situation in which you're committed to starting and completing steps in this project that add up to 40 hours when you've got 5 hours a week. Just don't do it to yourself.

Push it out. You're lying. You're just setting yourself up to lose. You're just going to feel bad about yourself. Don't do it. If it means that you need to change either the size of

the project in your goal statement or the date by which you'll have the goal, then change it.

Be real with yourself here. Like I said, it's a happy problem if it gets done faster. It will cause no end of heartache and frustration if you keep setting yourself up to get accomplished more than you really are able to accomplish. Don't do it to yourself.

This is the first test of reality of your time frame on the goal – is it realizable, now that you know what you will have to do? – adjust it if you need to
                        Know that this is flexible – you will change dates as you
                        work through the plan – it's inevitable.

This is the first real task of the reality of your time frame on the goal, the size of the goal. Is it realizable? Now that you know all the things you're going have to do to accomplish that goal. If it's not, no harm, no foul. Just adjust it, okay?

And remember this plan that you're creating today, you're going to be assessing and adjusting it throughout the whole project. Don't try to be perfect. Just make your best guess. Know that all plans are open to be changed. This is flexible.

You're going to change the dates as you work through the plan. It's inevitable. It always happens. Don't feel bad about yourself when it happens to you, because it happens to everybody.

Just ask Steve Jobs, right? I mean how many times have they said, "We're going to be releasing it on this date," and then 6 months later, it gets released, right? It's the nature of the beast.

Total Cost
This may also affect your dates – because if you can only give $300 a month to the achievement of this goal, and a particular step costs $600, it's going to take you 2 months to achieve it.
Total cost: this may also affect your dates, because if you can only give $300 a month to achieving this project or this piece of the project, then…and this piece of the project....actually, let me say this again. If you can only give $300 a month towards the pursuit of this goal, and a piece, a particular step of the plan is going to cost you $600 than that step alone is going to take you 2 months to achieve it, right? Because you won't have the money.

So you'll achieve $300 of it this month, and next month you'll achieve the rest of the $300 of it. Okay?

VOILA! YOU HAVE A PLAN!
You do all of these things. You fill out the Time Estimate, the Start Date, the Due Date, the Cost, Delegated To, and Status to the best of your ability, and obviously Status starts at zero for all of them. Voila! You have a plan.

TIPS AND TRICKS FOR IMPLEMENTING IT

So I'm going to spend the last few minutes of this call giving you some tips and tricks for implementing it, and of course, some of this is going to get reiterated in the next class on this topic, because step 4 is Create the Plan. Step 5 is Implement the Plan.

IMMEDIATELY BUILD IT INTO YOUR SCHEDULE

But I just want to give you some ideas. Immediately as soon as you've got a plan built, build it into your schedule. Put the actions for this week, this month into your To Do system. If you use Toodledo or you use Tasks or you use Daylight or you use whatever you use to manage your To Dos, put these action items into your list. So you actually take action on it, because a plan…it means nothing until you put it into action.

Calendar specific dates and times when you will be working on this project. You won't need to calendar which actions you're going to be working on because you'll just follow the plan. You'll open up the Excel document and say, "Okay what's next?" Okay? But calendar the time.

PUT THE ACTIONS FOR THIS WEEK OR THIS MONTH (DEPENDING ON HOW YOU WORK YOUR SYSTEM) INTO YOUR TODO SYSTEM

CALENDAR SPECIFIC DATES AND TIMES WHEN YOU WILL WORK ON THE PROJECT – YOU DON'T NEED TO CALENDAR WHICH ACTIONS, B/C YOU'LL GO TO THE PLAN FOR THOSE DETAILS – WHAT'S NEXT?

If you say, "I'm going to spend 5 hours a week on this goal," which 5 hours? What dates? Be specific. Be real and honor and protect that time as if it was an appointment with God herself. Okay?

ONCE YOU'VE FILLED IN ALL THE COLUMNS, YOU CAN REORDER BY START DATE, DUE DATE, STATUS

B. Once you've filled in all the columns, this is why I love Excel, you can sort by Start Date, Due Date, Status. Now keep in mind when you do a sort, make sure you highlight all the columns in what you want to sort, because if you sort only by the task name, it will detach it from the date, all of the rest of the columns, and you'll be screwed.

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Of course you click the back arrow, and I know this from personal experience, because I made that mistake, but sort...highlight everything before you sort. And sorting, you could sort, "What pieces of this project have I committed to start this week? Oh wow, you know what, this stuff came up this week. Let me add in those items," or "No, let me get to work. I'm going to start on this one."

WHAT NEEDS TO BE STARTED THIS WEEK?

WHAT'S DUE THIS WEEK?
You can sort by what's due this week. "What are the things that I committed to be complete this week and let me get to work on that stuff?"

WHAT'S ALMOST COMPLETE THAT I CAN CROSS OFF IN THIS HOUR OF TIME I DIDN'T THINK I'D HAVE?
"What's almost complete that I can cross off in this hour of time that suddenly opened up for me because so and so cancelled our date?"

It's great, man, when you get a chunk of time instead of getting to your long to-do list and saying, "Uh I don't know how should I spend my time," and by the time you figure how to spend your time, the time is gone.

Open up the plan and say, "What can I get done really quickly? What's almost complete? What can I bang out in this hour?" So you can sort by status, and that's a great use of that column. I recommend that you keep...you work in the plan document.

CROSS OFF OR PLAY WITH COLOR TO IDENTIFY WHICH ACTIONS ARE STARTED, COMPLETED, ETC.
Cross off stuff when you're complete and do a little happy dance. Play with color to identify which actions are started, completed, which ones are on hold because you're waiting for something. You know, choose different colors to represent those things for you. It will also make it much easier and faster for you to find stuff. I like the cross off feature in Excel or Word, whichever you're using because I love seeing something crossed of my list.

What I like to do, I like keeping the crossed off stuff on the plan until I can no longer make sense of the plan, and then I delete it. You're going to get to a point where you stop being able to find the stuff that still needs to be done because so much of it has been crossed off.

At that point, definitely delete the crossed off stuff, but I like seeing the percentage of stuff on my long plan that's gotten complete, because it gives me a sense of where I stand in the project.

Some clients have used colors. They've used blue for complete, green for started, red for overdue, you know whatever you want to do.

CELEBRATE EVERY COMPLETION, BIG OR SMALL

Celebrate every completion, big or small, even if you don't complete an action. You can also have a column on this list for notes. In fact, that's a good piece, and I forgot to put it on here.

Notes are good for when you stop an action step in the middle. You run out of time. You don't get to complete it. Make a note of where you left off, so the next time you pick up the plan, you know where to start from because it's right there on the notes.

You can make a note about, you know, I'm waiting for so and so to call me back, and you go back in the plan and you realize, "Wow, that happened 3 days ago. Let me call them again," you know.

IF YOU HIT AN OBSTACLE:

So use notes for that kind of thing, and you can use notes to make note of what you've completed, you know. You get something 50% done, celebrate that. It's 50% more done than it was! It's awesome. You're halfway there.

If you hit an obstacle, like if you're waiting for someone else to finish a piece and you're waiting for them, don't twiddle your thumbs. Go back to the plan and see where can you make progress while you're waiting on them.

IF YOU'RE WAITING FOR SOMEONE ELSE TO FINISH A PIECE, DON'T TWIDDLE YOUR THUMBS, GO BACK TO THE PLAN AND SEE WHERE YOU CAN MAKE PROGRESS WHILE YOU'RE WAITING

And you can use the plan to give them a deadline. "Hey, my plan depends on you getting this piece complete by this date. Is that doable?" People respond to deadlines. Don't you? We always work better with a specific end date, because then our brain knows how to manage our time. "Okay, we've got to get this done by this end date."

Deadlines are great. They're necessary. Otherwise, we push stuff out until, you know, the last minute or it just never gets done because there's no deadline.

GO BACK TO YOUR VISION FOR FORTIFICATION

If you hit an obstacle, go back to your vision for fortification. Re-read it. Give yourself the experience of having the goal. Imagine it. Put yourself in that place vividly and specifically. And then go back and look at the obstacle and say, "Hmm, well this is just an obstacle. What can I do? How can I work around it? What's the hack I can come up with to figure this out? Who can I get to help me?" Okay?

GO TO THE THINGS YOU TOOK OFF THE PLAN TO SEE IF THERE ARE IDEAS FOR GETTING AROUND THE OBSTACLE

Go to the things you took off the plan. Remember that list that you took off, that you made of the things that you took off the plan, because there may be an idea there for how to get around this obstacle.

There may be an idea there that at the time looked silly, but now makes perfect sense. Or at the time felt really out of your comfort zone, but since you've been working on this project for 45 days, it actually feels much more doable now. So you can use that big brainstormed list that you've decided that didn't belong in this plan to be creative around ways to get past obstacles.

IF YOU FIND YOURSELF AVOIDING A PARTICULAR SECTION OF THE PLAN:

ASK FOR SUPPORT

If you find yourself continually avoiding a particular section of the plan, ask for support. That is a great question to submit either by email if you're a professional member, through the 15 minute Laser Coaching session if you're Professional Mentor level, because I can, I very possibly can break you through that obstacle.

Or in the...submit it to the Ask Coach Debra call if you're a Foundation level. Go ahead and ask for support.

GET SOMEONE ELSE TO DO THAT STUFF

Get someone else to so that stuff. Hire someone. Get someone else to do it or let's say you set aside 4 hours to work on this project, start with the thing you're avoiding, and just say to yourself, "I'm just going to do it for 5 minutes, and then I'll go do the step that feels easier and more fun. I'm just going to do it for 5 minutes." Okay?

START WITH THE HARD PIECE AND REWARD YOURSELF WITH SOMETHING THAT YOU THINK WILL BE EASIER OR MORE FUN.

ALWAYS BE UPDATING AND EDITING THE PLAN

Always be updating and editing the plan. A good plan is a living document. A good plan is flexible and adaptable as your circumstances change, which they will. You can change the size or deadline of a goal when it makes sense. It's your goal for God's sake.

A GOOD PLAN IS A LIVING DOCUMENT

A GOOD PLAN IS FLEXIBLE AND ADAPTABLE AS YOUR CIRCUMSTANCES CHANGE

YOU CAN CHANGE THE SIZE AND/OR DEADLINE OF A GOAL WHEN IT MAKES SENSE TO

OWN YOUR PLAN
And own your plan. It's yours to follow, to change. Each choice that you make is going to have its consequences, but that's the nature of the beast. Again, this is life, right? Own it. If it's not working, change it, okay?

IT'S YOURS TO FOLLOW OR CHANGE – EACH WILL HAVE ITS CONSEQUENCES

IF IT'S NOT WORKING CHANGE IT!

SHARE YOUR PLAN – BUT WITH DISCRETION
Share your plan but with discretion. I wouldn't share it with just everybody but if you feel someone who is important, like a spouse or a partner or a parent or a child, isn't taking you seriously, show them the plan. Ask them for support. Put them to work on parts of the plan.

IF YOU FEEL LIKE SOMEONE IMPORTANT (SPOUSE/PARTNER) ISN'T TAKING YOU SERIOUSLY, SHOW THEM THE PLAN AND ASK FOR HELP

USE THE PLAN TO SUPPORT ASKING FOR FINANCING
"Hey can you take this piece?" Use the plan to support asking for financing. You could if you're creating a Kickstarter project, put the plan up there! Say look, "I've got this great plan. This is how I'm going to put your money to work." Okay?

ACCOUNTABILITY PARTNER
And I'm a huge believer in accountability partners. I have someone I talk to every week. We make…we share our results from the week. We talk about what we're committing to this coming week. We support each other.

Accountability partners are awesome, and work with a coach. A coach is a great accountability partner, at least I am. I will hold you accountable to the actions you promise. And you hit an obstacle, we will figure out a way because that's what I do.

Alright guys, this is how you create a plan. Hope you found it valuable. Please share your comments on the class post. Tell me what…how you're doing on creating your plan, and submit questions in all the various ways you have to get support from me. Have a great day and we'll talk to you soon.