



# Vision & Goal Planner

Rock Your Vision Masterclass 2021

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*By Ruby Marsh*

## STEP ONE

# Infuse Energy & Intention *into your business*

### ON SUCCESS...

*When one door closes, a hundred doors open.  
Your natural tendency should be towards success. Success  
is not a symbol, it is an affirmation - Yogi Bahaan*

### WHAT CREATIVE MARK DO YOU WANT TO LEAVE?

We have arrived at an extremely significant time in history, things are moving fast - success is as much about "keeping up" as it is how much you have in the bank.

I believe small business has the opportunity to contribute significantly to this moment in time, because we can use our creativity to connect authentically human to human, at an intimate level.

With energy being our greatest commodity right now, we need to remind ourselves

that more information does not tell my mind where to go. In this time, we need to tune in to the information/thought that will *actually* direct the action, and remember - you will always create more impact through doing.

With this time, comes the opportunity to scribe our own creative mark on the world - just like you would to an old timber bench.

Call it legacy, dharma art or being in service of your creator, whatever term feels good for you - this is your time.



### QUESTION 01

What's a feeling you want to hold within you as you move through this year?

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### QUESTION 02

What is a creative anchor you can lean on?

*This could be a practice or habit such as meditation, yoga or journalling, prayer, spending more time in nature, feet in the dirt or on the sand, enjoying fresh flowers, sketching, essential oils...anything goes!*

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### QUESTION 03

What is one thing you can do to nourish yourself weekly?

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*Stay active, and remember to hydrate, eat nourishing foods and take moments for yourself throughout the day to support stamina and mood regulation.*

*Aim for subtlety, balance and an even keel instead. "Slow and steady wins the race"*

DAILY CHECK-IN

STEP TWO

# Goal Clarity

*in your business*

HOW GOALS FIT INTO THE PROCESS

*Cast a Vision for the year → choose intentions or objectives  
→ outline goals (quarterly) → choose weekly or monthly  
milestones*

Too many goals? Not sure what goal to work on now? Here's some thought-starters to help you narrow in on your goal/s.

THOUGHT-STARTERS

What specific actions will "move the needle" in your business (generate abundance) and move me towards your vision?

Is there a creative project you've been putting off this year and now you could use this container to work on it?

Is there a longer term goal you have for 1-3 years? what would be a short term goal you could work on to get you closer?

Focus - do you want to streamline your offerings? Or add something new?

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## STEP TWO

# Goal Clarity

*continued*

### CROSS-CHECK YOUR GOALS FOR ALIGNMENT

*When a goal is in alignment, we have four forces driving the energy in a positive direction. There are two internal and two external forces at play.*

*Rate yourself 1 (low relevance) - 10 (highly relevant) as it relates to the goal on the following:*

#### INTERNAL FORCES - IDENTITY

- 1. Is the goal in line with your personal standards for excellence - does it say “I’m a person who does that”?**
- 2. Are you obsessed with the topic?**

#### EXTERNAL FORCES - HOW THE EXTERNAL WORLD IMPACTS/INTERACTS WITH YOUR GOAL

- 1. Do you feel an obligation or a duty to do it? Is it calling you?**
- 2. Is there urgency (real deadline put on themselves or by others)?**

ADD UP YOUR POINTS TO GET A SCORE OUT OF 40. YOU WANT A MINIMUM SCORE OF 30/40 OR 75% TO SAY THAT THERE'S ALIGNMENT WITH THE GOAL AND YOU SHOULD GO AHEAD WITH IT

STEP THREE

# Create your *success container*

## QUESTION 01

Boundaries help us maintain consistent energy and help us remove distractions by dedicating full focus to our goal.

List below, a boundary you will implement over the next 3 months.

*Some examples of boundaries could be:*

*Space boundary - orderly work space, remove digital distractions, phone in another room*

*Energy boundary - time of day you work best, do you need to eat and workout before you work on your goal*

*Relational - what you need from others around you*

*Time boundary - work between certain hours of the day, or every weekend between 9-12pm*

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## QUESTION 02

Dial in your support crew. Share the goal and raise the stakes! List below 1-3 people who you will tell your goal about and request support or accountability from:

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## QUESTION 03

Could you let the journey be easy? What action/s would give you the quickest result?

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STEP THREE

# Create your

*success container continued*

## A VISUAL REPRESENTATION

Boundaries help us maintain consistent energy and help us remove distractions by dedicating full focus to our goal.

List below, a boundary you will implement over the next 3 months.



## STEP FOUR

# Dial in your *mindset*

### OVERCOMING FEAR

*Our fears, habits, patterns, conditioning typically sit in the subconscious part of our brain. Because around 90% of our thoughts and actions come from the subconscious, we need to work a little harder to not be overrun by it. This means we need to bring conscious awareness to our fears from the beginning. We're not out to get rid of fear, it can be helpful sometimes and actually show you're on the right path so we want to learn to "feel the fear and do it anyway" (Susan Jeffers)*

### QUESTION 01

**Acknowledge the fear/hiding/blind spot that might have held you back in the past or be playing on your mind right now:**

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### QUESTION 02

**Define a moment in the past where you exercised your courage muscle? When did you use bravery to move you into action?**

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## STEP FOUR

# Dial in your *mindset - continued*

### **Q**UESTION 03

List 1-5 achievements below that you are proud of from either your business journey and/or career?

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### **Q**UESTION 04

Can you make a commitment to keep going despite being afraid, not knowing all the answers or it being perfect?

"I commit to consistent action despite (insert fear) because I know I am supported and safe"

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# Detailed Goal Plan

## STEP ONE: PRIMARY OBJECTIVES

List 3 objectives you have for the next 12 months that would have you feel successful in your business?

(remember objectives don't need to be tangible, they can relate to a way you want to feel or a vision you have for yourself)

- 1.
- 2.
- 3.

## STEP TWO: TURN THE OBJECTIVES INTO GOALS

From the objectives, we set goals to help us fulfill and measure progress. To create a goal from our objectives, we make it tangible (measurable in some way, a quantity, a value, a dollar figure) and give it a deadline.

- 1.
- 2.
- 3.

## STEP THREE: BREAK DOWN EACH GOAL INTO MILESTONES

For every goal, break it down into steps or milestones.

E.g: if your deadline for the goal is 3 months away, then you will have at least 3 milestones (one for each month). However, I would encourage you to have at least milestone for every 1-2 weeks to align with your weekly planning.

Check your milestones to make sure there's a mix of "active" (these actions put you directly in front of your client) and "passive" (actions behind the scenes).

Finally, mark in your calendar each of your milestones.

# Additional Resources



## PODCAST EPISODES

Tune into these episodes to get specific support on developing your small business idea, examples of women in small business and mindset tips for consistency.

Here's a few favourites that focus on dialling in your mindset over the coming months:

Ep. 2 - Where could brave over perfect lead you?

Ep. 45 - Going Level 10 in your life and business with Karissa Kouchis

Ep. 49 - Are boundaries the key to being more productive & present in your life?

Ep. 56 - Letting go of the beliefs that keep us small