

FOCUS LIKE A BOSS

This very important workbook belongs to: _____

focus | fo•cus

NOUN Maximum clarity.

VERB Bring something into alignment.
Direct one's attention on something.

Focus is a valuable skill in life and a competitive advantage for your business.

When you possess the skill of focus you have a superpower!

- ✓ You are able to manage yourself.
- ✓ You can set clear goals.
- ✓ You can achieve your goals.
- ✓ Your calendar aligns with your core values.
- ✓ You follow through on your commitments.
- ✓ You have clarity about when to say "yes" and when to say "no".
- ✓ You have a reliable system for getting "unstuck" and back on track.
- ✓ And so much more...

After completing Focus Like a Boss, you will have the skills and the tools necessary to live a focused life and run a focused company.

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Before you begin...

1. Why did you join Focus Like a Boss?

Something from this program that I am hoping for is:

2. Write a note to yourself of what you will do as a reward to celebrate once you complete FAB.

After completing the program, something I will do as a reward for myself is:

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FOUNDATIONS

Lesson 1.1

- ✓ The 5 Components of a Focused Life
- ✓ The 4-Focus Method
- ✓ The 8 Laws of Focus

Success for this lesson: Get an introduction to the frameworks that will help you with living a focused life, in your personal areas of life as well as professional.

There are a few important skills that help you to live a focused life. We will be referencing these throughout the program.

Personal Integrity

Your internal muscle that gives you the ability to keep commitments to yourself and follow through with your goals and routines.

Focus

Day-to-day focus provides you with the clarity to know *what* to do and the skill to persevere with the task at hand.

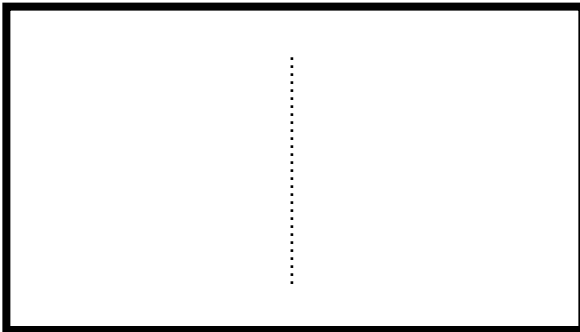
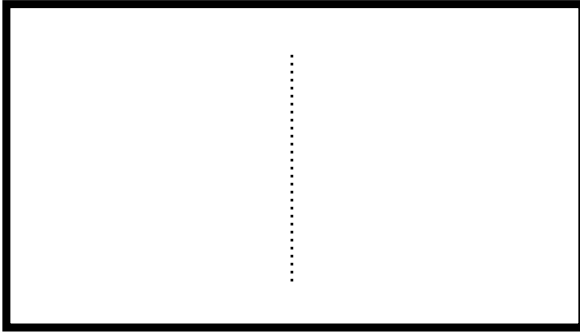
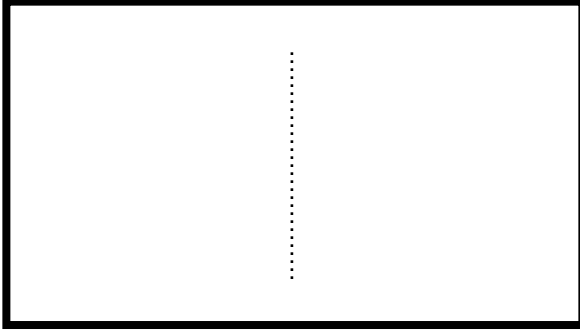
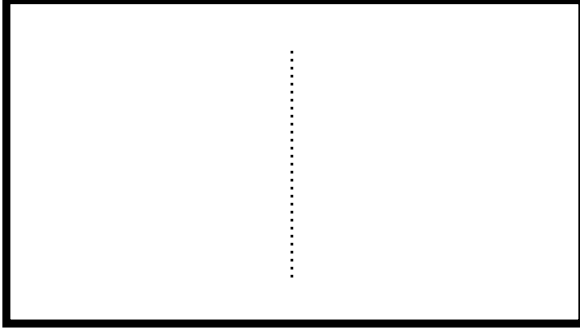
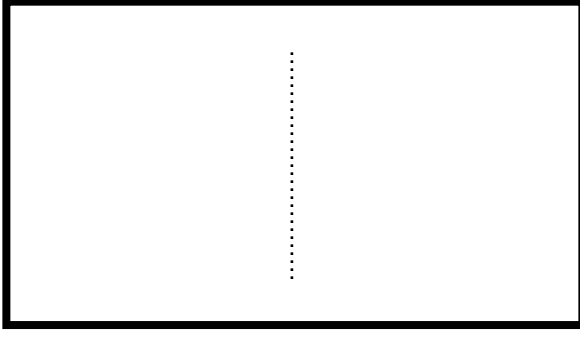
Creative Imagination

Your creative imagination and mental toughness both help you stay focused on difficult tasks, find solutions to challenges and problems, and do your best creative work.

The Progress Principle

Your productivity, motivation, and morale are all improved when you are able to see that you are making progress on meaningful work.

The 5 Components of a Focused Life



Which of the 5 Components of a Focused Life feels strongest to you right now?

Circle the one area that feels the strongest.

Vision & Values

Goals

Action Plan

Schedule

**Habits &
Routines**

Why do you think that is? _____

Which of the 5 Components of a Focused Life feels the weakest to you right now?

Circle the one area that feels the weakest.

Vision & Values

Goals

Action Plan

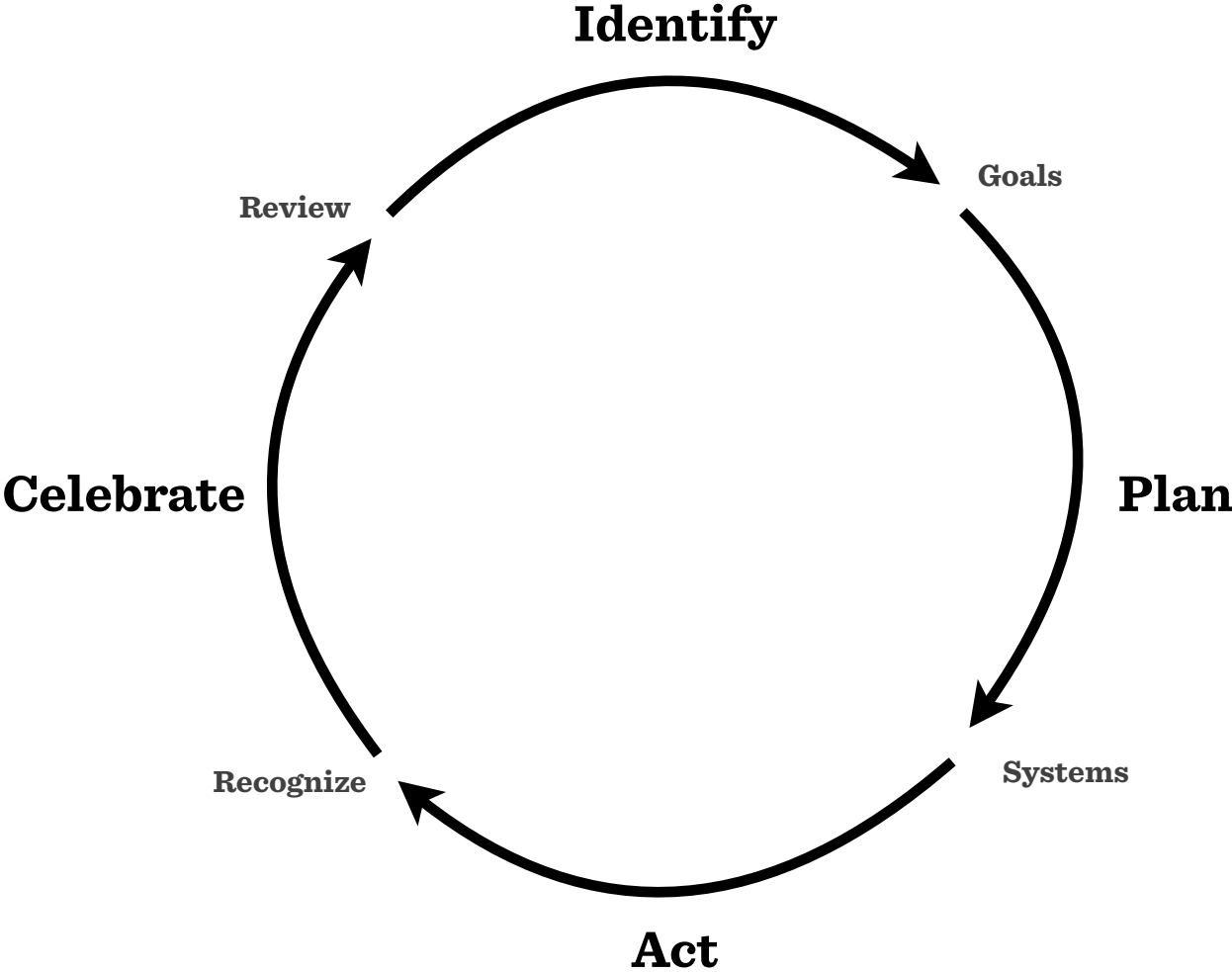
Schedule

**Habits &
Routines**

Why do you think that is? _____

The 4-Focus Method

A Flywheel for *Living a Focused Life*



1: Identify

Many people struggle to identify that which matters because they lack clarity about the bigger picture of their life's mission and vision. ("People perish with lack of vision.")

2: Plan

When you have identified what is important, you must set aside time for it. Otherwise all you have is a wish or a hope that gets no traction in your life.

3: Act

This is where you do that which you said you would do. It will naturally include your tasks and actions, but it also includes things such as meaningful moments with your family, resting and recharging, and more.

4: Celebrate

When you've done that which you set out to do, that's cause for celebration! Reinforce your positive actions and recognize that you've just done something that matters.

.....

Which, if any, of the 4 steps in the flywheel are your strongest or favorite?

Identify

Plan

Act

Celebrate

.....

Which, if any, of the 4 steps in the flywheel do you most often skip or ignore?

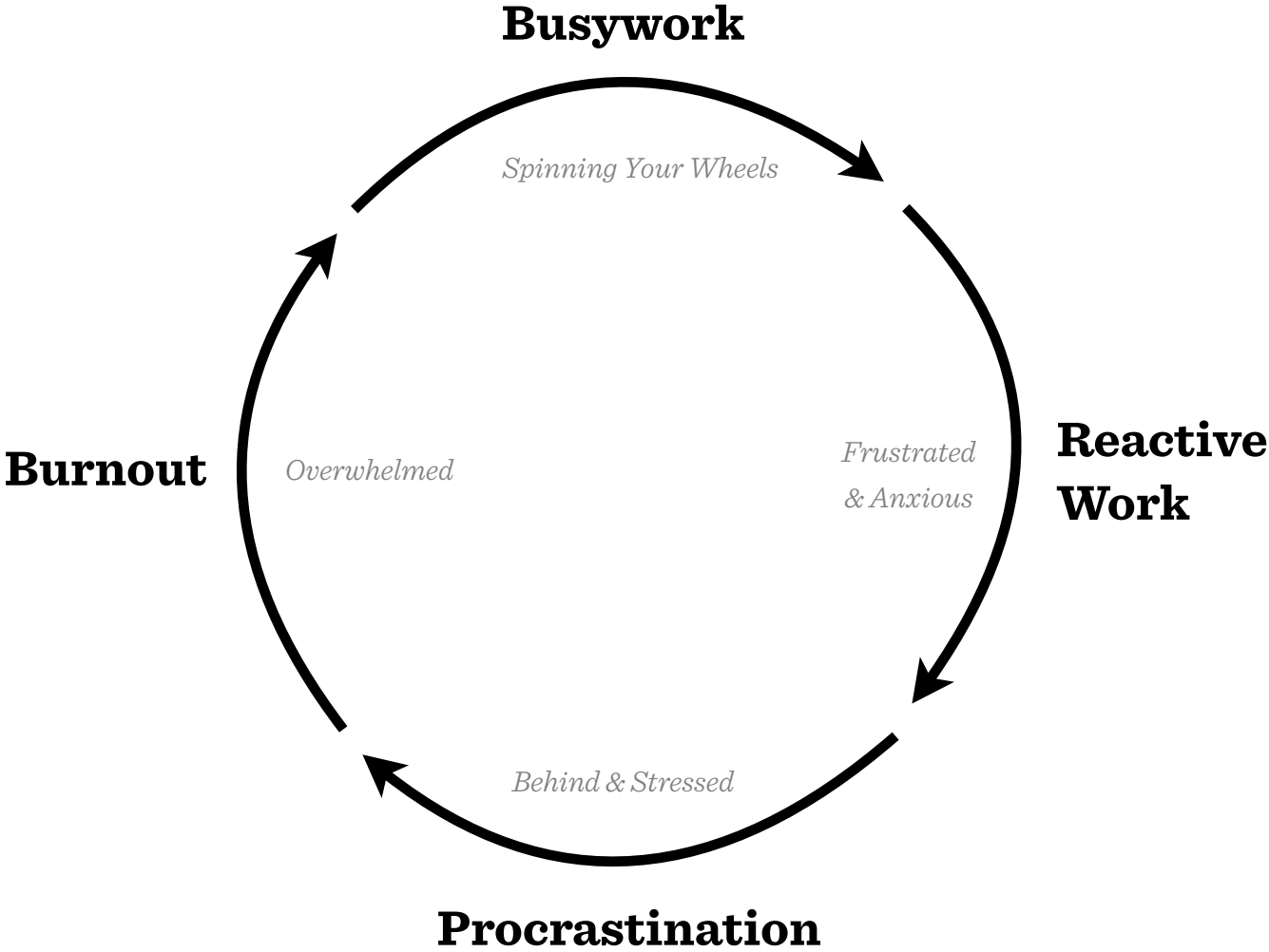
Identify

Plan

Act

Celebrate

Four Symptoms of a Busted Productivity System



1: Busywork (Spinning Your Wheels)

Doing tasks and activities that are not rewarding, they don't add up, they don't compound into anything substantial over time, and they don't really move things forward. Simply put, they're not the best use of your time. This happens when you lack clarity.

2: Reactive Work (Feeling Frustrated & Anxious)

When you find yourself reacting to the needs of others and unable to follow through with your own priorities. There is always something else coming your way that you have to react to, and you're not able to proactively focus on the things that you know you should be doing. This happens when you have no system for reliably planning and scheduling how to spend your time.

3: Procrastination (Feeling Behind)

When you and/or your team have a hard time following through on your commitments. Tasks get put off to the last minute or skipped altogether. This happens when you lack personal integrity and/or a system of execution.

4: Burnout (Feeling Overwhelmed)

When you feel like you are on the hamster-wheel of hustle. You are feeling burnt out, unmotivated, and can't see how your current activities lead toward your desired outcomes. This happens when you do not regularly recognize your progress and celebrate those small wins.

.....

Which, if any, of the 4 symptoms in the flywheel do you most relate to?

Busywork

Reactive Work

Procrastination

Burnout

Share your answers with the Boss Board.

Use the community Slack channel and the Boss Board live call to share what you put from pages 10, 12, and 14.

BONUS

The 8 Laws of Focus

The 8 Laws of Focus

When defining what it means to “be focused” or to “have focus”, what are we seeking to clarify? What does it mean?

There are a two primary expressions of focus in our life. One as a noun and the other as a verb.

1. There is the attainment of focus in the form of a clear vision and priorities.
2. There is the skill of focus in the form of our ability to direct our attention on to that which matters.

The former, big-picture, high-level clarity comes when we know who we are and what we value.

There is also the daily skill of being able to focus on the task at hand and give our attention to that which is happening in the moment for us — from dinner with friends, a conversation with a loved one, an evening reading a book, or a morning spent doing research for our job.

The power of living a focused life is found when we have clarity about what is deeply important to us and we are able to consistently spend our time each day on those things.

1: The Law of Clarity

The very definition of focus is *maximum clarity*. It is impossible to live a focused life without clarity.

This is true for the big-picture of your life, all the way down to the small tasks you do each day. You must be clear about what is most important.

Without clarity, it is impossible to set boundaries and priorities. Without priorities, it's impossible to plan and to walk out your life's mission. Without clarity, you will find yourself unable to focus on the things which deeply matter to you and your schedule will be filled with other people's priorities for your life.

2: The Law of Boundaries

Those without clarity will see boundaries as tedious restrictions that hold them back. Those who lack focus will try to embrace a life without boundaries — they will try to do it all. They will say yes to everything.

A lack of boundaries is a symptom of a lack of focus. And it leads to a lack of margin, which, in turn, leads to burnout. When you are living in burnout, you are unable to give your time and attention to that which matters. You are unable to walk out your values.

Boundaries liberate you to live a focused life! Proper boundaries protect the things which you care most deeply about. Boundaries empower you to stay focused on that which is most important and to avoid the pain of burnout and the frustrations of unfocused responsibilities.

3: The Law of Ownership

It is a personal choice to live a focused life. And you must take personal responsibility for walking out your vision and values. As such, your goals must flow from your values because your needs are your responsibility - it is your job to take care of yourself and to do the things that only you can do.

Without ownership and personal integrity, you may find yourself ignoring the activities and roles that only you can do, or placing wrong expectations onto others in your life.

4: The Law of Margin

Margin is necessary for a focused life. Margin in our life means we have breathing room. Without it, you will be unable to give your time and attention to that which you care deeply about.

Akin to the Law of Tradeoffs, to recognize the Law of Margin is to celebrate your limits. When you have Margin in your life, you will have strength to lean in to your values, accomplish your goals, and, ultimately, to be present for the relationships in your life.

5: The Law of Sowing and Reaping

While you cannot control your outcomes, you can control your input and your effort. There are many factors at play in the Law of Sowing and Reaping. You will only ever reap what you sow... but, at the same time, not all outcomes are guaranteed.

Additionally, over time, as you develop routines and habits, they compound into significant results. A singular action, done once, will not produce any significant results. Yet, over time, consistent action compounds into significant results.

6: The Law of Tradeoffs

As David Allen said, *you can do anything but you cannot do everything*. In order to give your perpetual devotion to any one thing it will require the perpetual neglect of many other things. Focus, therefore, requires tradeoffs.

You can only focus on so many things at a time. And you can only focus for so many hours during the day. Instead of ignoring the limitation on your energy, embrace it and find ways to routinize and automate the non-trivial areas of your life so that even when you are not giving them your full attention and devotion, they are not being fully neglected.

7: The Law of Action

A focused life is a life of action. It means engaging with your values, pursuing your goals, and following through with your commitments. It means proactively directing your attention on that which matters. There is no such thing as a passive life of focus.

If you find that you are coasting through life, then it means you are no longer taking action. If you are coasting then it means: (a) you are going downhill (rather than climbing upward); (b) you are living off the momentum of your past effort; or (c) you are being towed along by someone else.

There is one thing that all successful people have in common: they have a strong bias toward action. They don't let ideas sit around. They don't wait for their goals to just happen. They show up every day.

8: The Law of Attention

Where you direct your attention, that is the direction you will go. Our mind does not easily differentiate between “positive” or “negative” focus; we simply focus on that which we are giving our attention to.

For example, when driving in your car: If you stare at the lamp post and try not to hit it, you just might drift right toward it. Why? Because that was the direction you were focusing on and giving your attention to, and thus that is the direction you will naturally go.

The Law of Attention means what we direct our thoughts and focus on is what we will move toward. Thus, direct your thoughts and focus on the positive directions and desired outcomes you want rather than the negative directions and undesirable outcomes you wish to avoid. This is why the 4-Focus Method starts with Identifying that which matters.

Notes

VISIONS & VALUES

Lesson 1.2

- ✓ Identify your core values
- ✓ Write a draft of your Life's Mission and Vision

Success for this lesson: Identify your two core values. And, if possible, write a draft of your Life's Mission and Vision using the template provided at the end of this section.

After completing this lesson, and drafting my Life's Mission statement, I want to celebrate by...

Meaningful Productivity

Meaningful Productivity is the state of consistently giving your time and attention to the things that are most important.

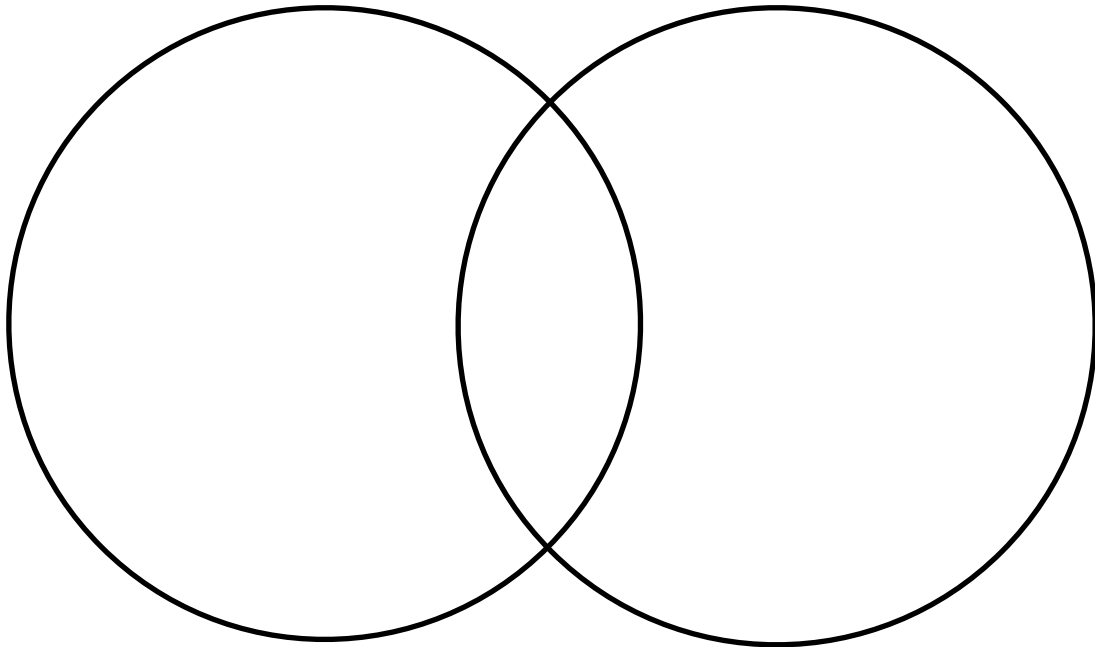
1. True productivity and time management are not based on efficiency, but rather on vision and values.

This is why you must start with your life vision and goals before seeking to define what it looks like to be intentional and productive (not just busy) in each area of your life.

2. Productivity “tricks” that promise lasting change apart from a foundation of personal values, vision, and integrity are merely skin deep and will not last.

It is important to identify *what matters to YOU* before you set goals, change your schedule, or start new habits and routines. Life can be tedious, hectic, and full of challenges. If you are spending your time on things that don't matter to you, it will be nearly impossible to maintain motivation and joy through the midst of life's tensions.

3. The starting line for focus, productivity, and time ownership is to have clarity on your values.



Meaningful Productivity means bringing your calendar into alignment with your values.

Your Roles

Review the three lists you just created (pages 26 - 28) and see if you can consolidate all of your relationships, responsibilities, and areas of contribution down into **7 or fewer roles**:

1	
2	
3	
4	
5	
6	
7	

Your MOB

Without Margin, Ownership, and Boundaries (MOB) then it will be difficult to lean into, and show up for, your most important roles. You will discover more about the MOB throughout the program.

Margin

Do you have the breathing room, health, and strength you need in order to lean into each area of your life? Margin exists for relationships and thus it enables you to be present for your most important roles in life.

Ownership (is a mindset)

Are you taking personal ownership over the things that you can control? Without ownership and personal integrity you may find yourself ignoring activities and roles that only you can do.

Boundaries

Do you have clear and healthy boundaries around what is yours to manage (and what is *not* yours to manage)? Without boundaries you may take on more than you can handle.

Journal: Ask yourself the following questions about your roles

How often do I find that I am consumed by one or two roles in my life, and that the others do not receive the time and attention I'd like to give them?

.....

If so... what are the roles which currently consume most of my time and attention and which are the roles that I would prefer to give more time and attention to instead?

.....

If I were to list out the tasks and goals that matter most to me in my life right now, how many of them are aligned with the roles that are currently receiving most of my time and attention?

What difference would it make in the quality of my life to consider these roles on a regular basis and to ensure that my activities are balanced?

.....

Do I believe that it is within my control and ability to change which roles receive and require the majority of my time and attention?

Find and Circle 10 Core Values

From the list below, **circle about 10 values and virtues that stand out to you** as those which you consider most important in your life right now.

Action-Oriented	Adaptability	Adventurous	Ambitious
Assertive	Authentic	Belonging	Caring
Cheerfulness	Communication	Community	Compassionate
Consistency	Confidence	Conviction	Courageousness
Courteous	Curiosity	Decisiveness	Diligence
Empathy	Excellence	Excitement	Faith
Focused	Forgiveness	Friendliness	Full of Integrity
Generosity	Grace	Gusto	Happiness
Hope	Humility	Independence	Joyfulness
Justice	Kindness	Knowledge	Leadership
Listener	Loving	Loyalty	Mannerly
Open-Mindedness	Organized	Parenting	Passionate
Patience	Personable	Promptness	Respectfulnes
Rest	Self-Sufficiency	Sober-Mindedness	Sound Judgment
Stewardship	Studious	Sympathetic	Teachable
Tidiness	Trustworthiness	Uniqueness	Unity
Unselfishness	Usefulness	Vision	Vulnerability
Wealth	Wholeheartedness	Wisdom	Wonder
_____	_____	_____	_____
_____	_____	_____	_____

Write your own, unique values in the spaces provided if you don't see some of your core values already listed.

Phone a Friend

As you consider your core values and the vision for your life, it can be incredibly powerful to hear from other folks in your life. *(It can also feel awkward and difficult to ask them for input. But I know you can do it!)*

Group One: Friends and Family

1. Reach out to a few personal friends or family members.
2. Ask them: *"What unique character traits or values do I bring to our relationship?"*

Example Script (feel free to copy and paste this into your own email / text message to a friend or family member):

Hey, NAME. I'm going through an online class, and I'm supposed to reach out to ask a friend about their perceptions of my values. If you have a minute, I'd love to hear from you.

What unique character traits or values do I bring to our relationship? What is a value that you think I carry most?

Thanks!

Group Two: Professional Peers

1. Send an email or text message to a few people who know you in a professional setting.
2. Ask them: *"What is my unique capability? What do I naturally do better than most people?"*

Example Script (feel free to copy and paste this into your own email to a co-worker):

Hey, NAME. I'm going through an online class, and I'm supposed to reach out to ask a peer about their perceptions of my talents and values. If you have a minute, I'd love to hear from you:

What do you see as my unique ability? Are there any values that I commonly express?

Thanks!

Phone a Friend Replies

In the spaces below, summarize the replies from the people you reached out to on page 33.

Person:
Their statement about me

Person:
Their statement about me

Person:
Their statement about me

Person:
Their statement about me

Your Legacy

Look back at your list of roles on page 29.

Identify a few relationships that fit within those roles.

Now... imagine that each of those people are speaking at your funeral...

Using the spots on the following pages (36 - 37), for each of those few people from your roles, write:

1. Their name (Jane Smith) OR their anonymous role (business contractor).
2. A character trait, value, or legacy you hope you'll have passed on to that person.
3. What is something related to that character trait, value, or legacy that you would want them to say about you at the end of your life?

Sample Legacy Statement

Person: Giovanni (my son)
Character trait, value, or legacy I passed along
Generosity
Their statement about me
My dad was a generous man, and he taught me that you can never give too much. I love how he always modeled generosity to me and my brothers, and was always so happy to give to people in need. He taught us from an early age to be intentional with our money so we could be generous as well. And he wasn't just generous with his money. He was always so willing to give his time to our family and to people who needed his help.

Person:

Character trait, value, or legacy I passed along

Their statement about me

Person:

Character trait, value, or legacy I passed along

Their statement about me

Person:

Character trait, value, or legacy I passed along

Their statement about me

Person:

Character trait, value, or legacy I passed along

Their statement about me

Person:

Character trait, value, or legacy I passed along

Their statement about me

Person:

Character trait, value, or legacy I passed along

Their statement about me

Choosing Your Top 2 Core Values

Looking back at the previous pages and the values you circled (pg. 32), the values your friends, family, and co-workers identified (pg. 33), and the values you identified for your most important roles (pg. 36 - 37)....

Pick the two values that mean the most to you.

First, list the two values which you feel are the most important in your life and the most influential toward your decisions and actions. Write them in the blank spaces below.

Now, assign a priority ranking of 1st and 2nd for the values listed above (with #1 being the value that you consider to be MOST important to your life right now).

Choosing your top 2 values may feel impossible! But rest easy. By identifying these top values does not mean you are ignoring all other values that you consider important. You are simply recognizing that these 2 values play the most critical role in your life right now. Your values can (and probably will) change. Different seasons of our life, we often hold different values to be more or less important.

Also, consider if there is a value that serves as a larger “umbrella” value — one which encompasses or includes several other values that are important to you.

How Do You Express Your Top 2 Core Values?

Describe how you express your core values as if you already live each value out **exactly** as you would want to. Many of us see our faults all too well, or we are still maturing in our ability to express our values; that's okay. In this spot, I want you to describe it as if you do it perfectly all the time.

Value (example): Loving
Description (example)
I am a loving person. I love myself well by taking care of my health, learning, staying motivated, and not being too hard on the shortcomings I see in myself. I love others well by putting their needs ahead of my own and being patient, kind, joyful, hopeful, and thoughtful towards them.

Value # 1:
Description

Value # 2:
Description

Your Life Vision and Mission

Using your answers from the previous worksheets, plug them into the template below.

This will get you started with a first draft of your life's mission statement. You can always edit and rewrite it or completely start over from scratch with something else entirely.

In my roles as a [your roles from page 29], ***I want to express, impart, and exemplify the values of*** [values from page 38], ***by*** [paraphrase your value descriptions from page 39].

Write your life vision and mission in the space below:

Your life vision and mission is something you can do no matter what season of life you are in. It should not matter what your job is, where you live, what your financial situation is, or what relationships you have, etc. You should be able to walk out this vision and mission in any situation and under any circumstance.

Notes

LESSON ONE

Wrap-up

Most Important

Identified my core values

Bonus

I drafted my life vision and mission

Bonus

Celebrated the completion of Lesson One

My key takeaway from this lesson:

Share your answers with the Boss Board

Use the community forum and the Boss Board live call to share your Core Values and/or your Life Vision Statement.

MARGIN

Lesson 2.1

- ✓ The 5 Areas of Margin
- ✓ Your Personal Margin Assessment
- ✓ How to Restore Margin

Success for this section: Get introduced to the concept of margin for your life and take the margin assessment.

After completing all of lessons two, I want to celebrate by...

Margin as a Necessary Component of a Focused Life

Margin is breathing room

Having breathing room in your schedule, your finances, physical body, emotional energy, and your mental energy is paramount.

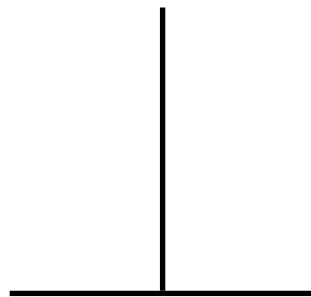
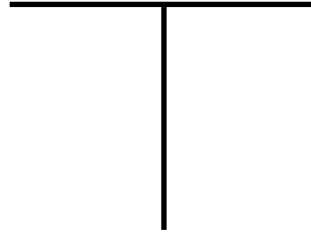
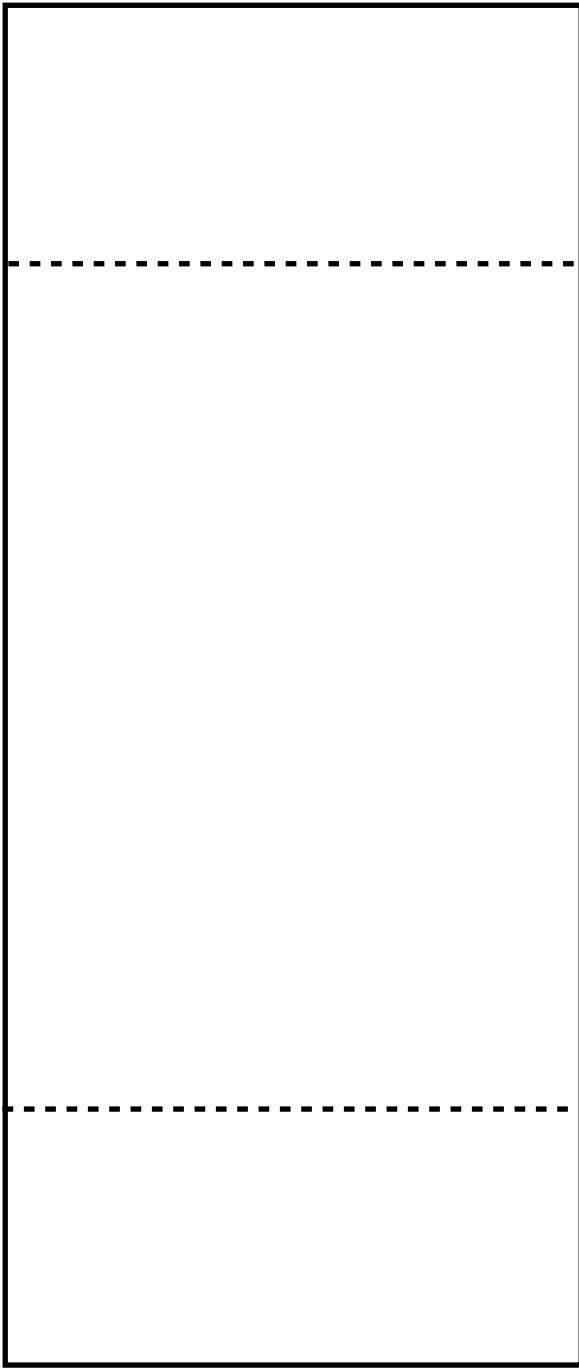
It's the opposite of overload

When you are at capacity, there is no room for anything else. But when there is space left over — when there is margin — that space enables you to breath.

Margin enables you to do your best creative work.

Margin enables intentional living.

Margin helps with stress and anxiety.



The Five Areas We Need Margin in Our Life

The diagram consists of five rectangular boxes. One large box is positioned at the top center. Below it, there are four smaller boxes arranged in a 2x2 grid. Each box is designed with a solid outer border and a dashed inner border, creating a margin for text or notes.

In a general sense, health in one area of margin leads to health in others.
And conversely, crisis in one area leads to crisis in others.

Personal Margin Assessment

How much margin do you feel that you have in each area? How much space is there between your load and your limit? **Circle the amount of margin you currently have in each area.**

Time

Negative margin Little to no margin Okay, but not okay Enough margin Plenty of margin

My schedule is out of control. I am burning the candle at both ends. I have no time for things that matter most.

My days are spent on the things I need and want to do. I have time for resting and recharging. I am flexible.

Finances

Negative margin Little to no margin Okay, but not okay Enough margin Plenty of margin

I have a significant amount of debt, I struggle to live within my means, and I tend to make irrational financial decisions.

I have a healthy emergency fund, I am debt free, I live within my means, and I am planning for the future.

Emotions

Negative margin Little to no margin Okay, but not okay Enough margin Plenty of margin

I have very little margin for dealing with anyone's issues. I feel frustrated, exhausted, and burnt out.

I am emotionally present and engaged. I am able to engage people and circumstances with my heart intact.

Creative

Negative margin Little to no margin Okay, but not okay Enough margin Plenty of margin

I can't seem to focus on anything these days. I am lacking inspiration.

I am excited to work on challenging problems or to dream up new ideas. I know what inspires me. I am always learning.

Health

Negative margin Little to no margin Okay, but not okay Enough margin Plenty of margin

I don't sleep well. I don't feel well. There is no consistency to my exercise or diet. I need coffee and stimulants to get me through the day.

I consistently get a full-night sleep. I eat well and incorporate exercise into my week. I have the energy I need to tackle life.

Margin Must be Normalized In Your Life

You must see margin as the true definition of normal for your total capacity — not some luxurious, unnecessary, extravagant thing.

As Dr. Richard Swenson writes: *“Margin is what you have in reserve for contingencies, emergencies, and unanticipated situations. Margin is the gap you maintain between rest and exhaustion, the space between breathing freely and suffocating.”*

Margin is countercultural.

Margin requires tradeoffs.

Margin is a moving target.

Margin Misconceptions

- “Margin is only for the financially independent”
- “Embracing margin is to embrace laziness”
- “A life with margin is the easy life”
- “Margin is a destination”

Trade-offs

Margin is about living within our limitations and recognizing we have a finite capacity.

We cannot do it all. Embracing trade-offs is to acknowledge our limitations.

Making hard decisions is about owning the outcome. When we refuse to make a decision, we’re allowing someone else to make the decision for us.

Margin Enables Living at a Sustainable Pace

Would you be able to sustain your current efforts for the next 10 years? More importantly, what would it cost you?

Redlining is a recipe for burnout. What margin do you need in order to thrive?

Liberating Truth: Margin is for _____.

Margin Exists for Relationships

Margin enables living into your values.

As such, Margin is about more than just YOU and your own healthy living.

As you are able to live a life with margin, you will be able to better serve those around you. Margin enables healthier relationships and deeper interactions with our friends and family.

To fight for margin is to fight for your values.

As you get clear about margin as an enabler of your values and goals, that mindset will give you motivation to fight for margin and keep it — even when it feels inconvenient and frustrating to do so.

Margin helps remove the unnecessary stress and pressures of life. It allows you to be more generous, present, and available to those around you. Which, in short, means that margin enables you to live out your values toward others.

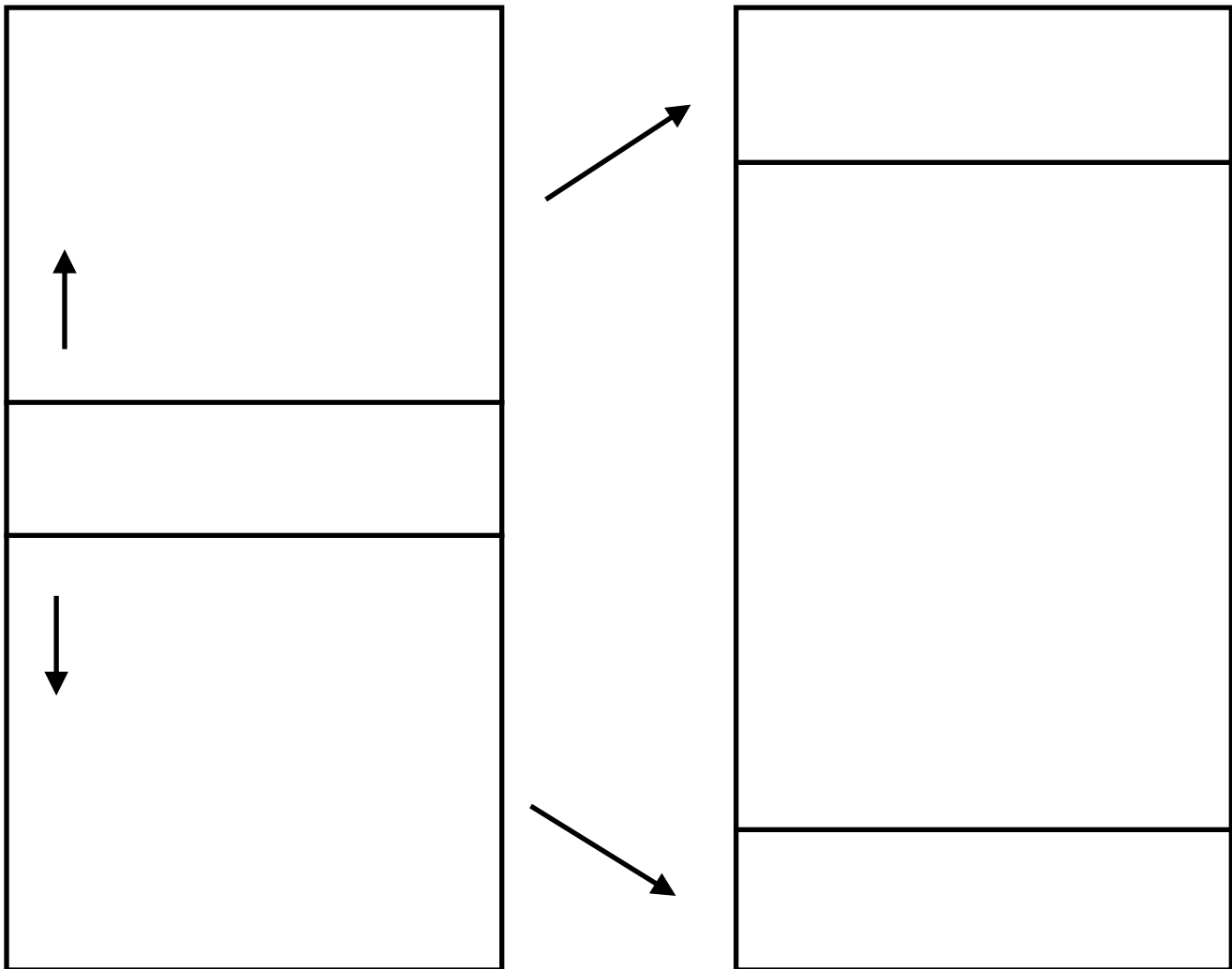
Look back to page 38 and write down your two core values again, here:

1. _____

2. _____

Do you currently have the margin you need in order to live out your values?

Restoring Margin Through Increase and/or Decrease



Ways to Increasing Your Capacity

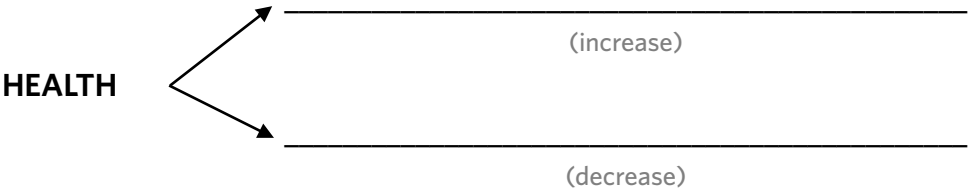
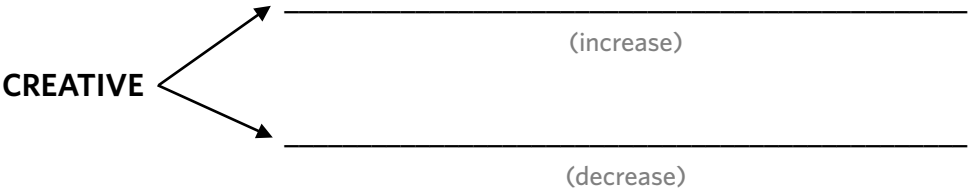
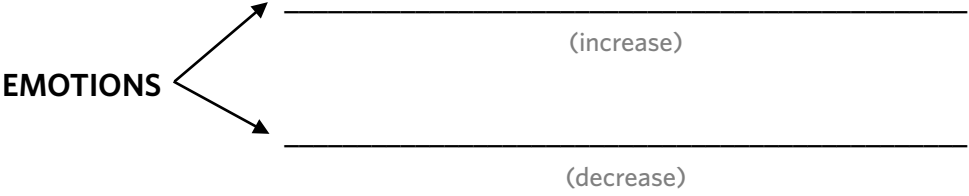
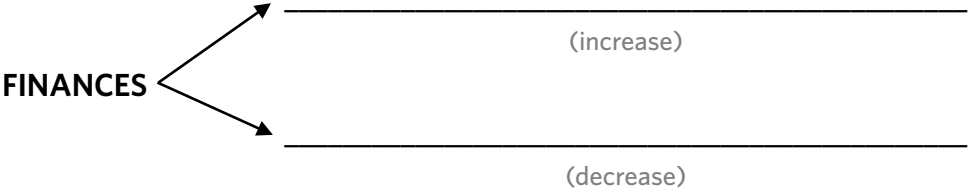
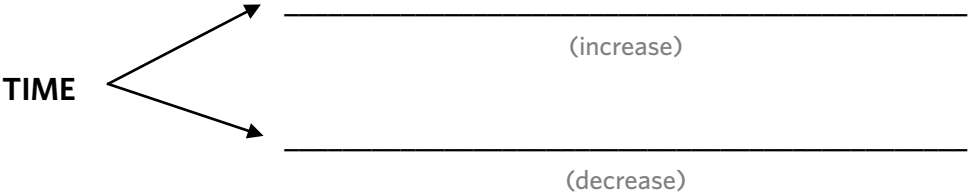
- Intentional Practice
- Deep Work
- Routine & Discipline
- Saving
- Strengthening

Ways to Decrease Your Load

- Automate
- Eliminate
- Delegate
- Self-Control
- Boundaries (“no”)
- Focus

Ideas to Restore Your Margin

In the space below, come up with an idea for how you can restore margin through **increasing your capacity** and **decreasing your load** for each area of margin in your life.



Notes

URGENCY & RESISTANCE

Lesson 2.2

- ✓ How to overcome the most common areas of resistance
- ✓ Urgency Assessment
- ✓ Inbox Addiction Assessment

Success for this section: Complete the short assessments and

High-Level Areas of Resistance

Whenever you set out to make change, or to embark on a bold venture, there will always be resistance. Here are the seven most common things that come against us in our efforts to live a focused life.

1. Inbox Addiction

This is the urge to continuously check our news feeds, social feeds, and inboxes despite a desire to stop. Overcome Inbox Addiction by removing external distractions from your devices and having a clear plan for how to spend your time.

2. Urgency Mindset

If you only spend time on the things that are *urgent*, you may never spend it on things that are *essential*. Overcome an Urgency Mindset by identifying what matters, setting aside the time for that which matters, following through on your plan, and celebrating your actions.

3. Distractions

The small and big things that pull our attention away from what we are focusing on. From a child interrupting us in our home office, to a large side-project at work pulling us away from our primary responsibilities. To deal with distractions, do all that you can to circumvent them before they even get to you. If you find yourself in the middle of a distraction, get out.

4. Lack of Planning

Without an intention of how you will implement that which matters, you are not likely to follow through. Overcome a lack of planning by deciding when and where you will do an important task or follow through on a critical responsibility.

5. Counterfeit Rest

True rest will leave you recharged with more energy. Find restful activities that give you energy rather than draining it. We like to say that if you work with your head you should rest with your hands (i.e. cooking, woodworking, landscape, etc.)

6. Busywork

Busywork consists of the non-essential actions we do that fill up our time in order to escape more meaningful activities. Busywork also includes the shallow tasks we do when we don't know what else to do. We believe that clarity cures busywork.

7. Perfectionism

With a perfectionist mindset we place too much emphasis on things having to be just perfect and just right. This applies to projects and tasks as well as to relationships, experiences, and other areas of responsibility. Overcome perfectionism by limiting the scope of how much time you are willing to spend on something; or by making the best choice you can with the information you have and then enjoying and appreciating what comes as a result.

Inbox Addiction Assessment Quiz

The Inbox Addiction Assessment is meant to be a simple questionnaire to help give you a better understanding into your usage of your smartphone and the frequency at which you check email, social media, and other incoming messages / analytics.

There are many different Internet addiction tests that are used to assess and measure addictive use of the Internet from mild to severe levels of Internet Addiction. The inbox addiction assessment used in The Focus Course is based on the IAT developed by Dr. Kimberly Young.

For each question, circle the number that best represents your association with that question.

The scale is as such:

1: Rarely

2: Occasionally

3: Frequently

4: Often

5: Always

How often do you find that you stay on your smartphone longer than you intended?

1 2 3 4 5

1: Rarely 2: Occasionally 3: Frequently 4: Often 5: Always

How often do you neglect or procrastinate minor responsibilities to spend more time on your smartphone?

1 2 3 4 5

How often do you check your email or social media timeline before doing something else that you need to do on your smartphone?

1 2 3 4 5

How often does your job performance, school work, and/or personal productivity suffer because of distractions on the Internet / usage of your smartphone?

1 2 3 4 5

How often do you find yourself anticipating when you will check your social / news feed next?

1 2 3 4 5

When at your computer, how often do you have your email / Twitter / Facebook app or website open (even if in the background)?

1 2 3 4 5

How often do you snap or act annoyed if someone bothers you or interrupts you while you are online or checking something on your smartphone?

1 2 3 4 5

How often do you stay up late due to using your smartphone in bed?

1 2 3 4 5

How often do you feel preoccupied with social media and email when you're "off-line?"

1 2 3 4 5

1: Rarely 2: Occasionally 3: Frequently 4: Often 5: Always

How often do you find yourself saying "just a minute" to someone else when you are online?

1 2 3 4 5

How often do you get your smartphone out to check email or social media when waiting in line at a store, at a stoplight, or other place?

1 2 3 4 5

How often do you use your smartphone when going to the bathroom?

1 2 3 4 5

How often do you check email and/or social media as the first things when you wake up, before you've even gotten out of bed?

1 2 3 4 5

How often do you check email, social media, and other stats as the first thing when you begin your work day?

1 2 3 4 5

How often do you interrupt a conversation you're having in order to check the buzz from an incoming notification on your phone?

1 2 3 4 5

Total Score: _____

The higher your score from page 59, the greater your level of addiction and draw to your inboxes. Here's a scale to measure your score:

15 – 39 points: You are an average online user. You may surf the web a bit too long at times and check your phone a bit more often than you'd like, but you have control over your usage.

40 – 59 points: You are experiencing occasional problems because of your smartphone and your inboxes. You should consider their full impact on your life and how you can seek to gain better control over your usage.

60 – 75 points: Your device usage is causing significant problems in your life. You should evaluate the impact of your smartphone and your inboxes and address the problems directly caused by your usage and behavior.

What is Inbox Addiction?

Inbox Addiction is an urge to continuously check our news feeds, social feeds, and message inboxes despite undesirable and even negative consequences or a desire to stop.

Fortunately, inbox addiction isn't as destructive as urgency addiction (which we will discuss next), nor is it as harmful and dangerous as problem gambling or alcoholism. However, it is still a very real issue that can derail us from living a focused life.

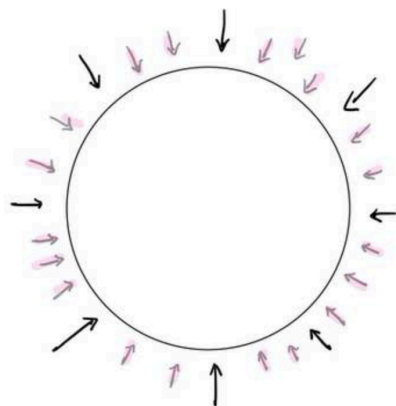
Inbox addiction poses a serious threat to doing our best creative work and staying focused on our essential tasks.

Here is a brief list of "inboxes" we have available to us to check in on: website stats, sales stats, Facebook likes, Instagram likes, Twitter @replies, Facebook messages, new emails, new articles in our favorite RSS feeds, updates in our Twitter, Facebook, Instagram, and Pinterest streams, incoming push and text message notifications, news headlines, stock market prices, and so much more.

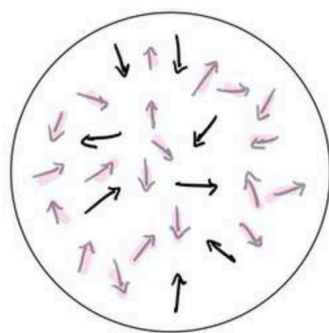
Reduce Your Inputs to Create More Focus

You need input, advice, and inspiration in order to make decisions, come up with new ideas, or take action on something.

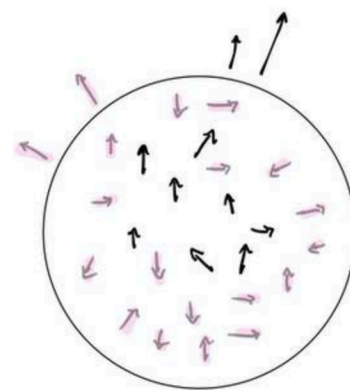
But with too many non-essential inputs then your ability to think clearly and make decisions is hindered. It uses up a lot your energy to manage all the incoming. Thus reducing the amount of energy you have to make clear decisions and take focused action. It leads to less progress, dual focus, and, ultimately, very little traction.



A plethora of inputs, opinions, and opportunities coming your way.

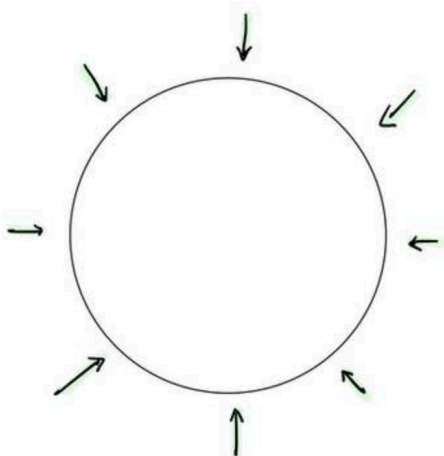


As they all mingle together, there is too much noise and not enough margin to think clearly and get focused.

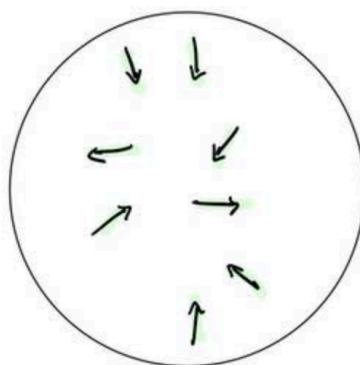


As a result, you end up with dual focus, competing actions, mixed motivations, and busywork.

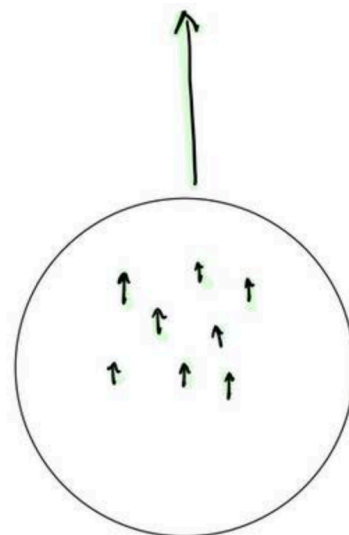
However... When you remove non-essential inputs, you give yourself more space and energy to think, find clarity, and organize your thoughts. Thus enabling you to take focused action and see progress.



Reduce to only the intentional, essential inputs



You now have space to think, decide, and find connections



Clear thoughts lead to focused action and the removal of busywork.

Ways To Deal with Inbox Addiction

The continual activity of checking your inbox can rob you of your ability to focus and to do substantial, meaningful work.

It can lead to a decrease in margin (Section 8) due to a sense of solitude deprivation, and it can reduce your ability to think clearly due to an overwhelming amount of inputs .

Here are some ways we have seen a reduction in inbox addiction, and an improvement in focus.

1. Reduce External Distractions

Turn off notifications for social media, email, news, etc.
Only have the absolute most critical options.

2. Eliminate Options

Remove email and social media from your smart phone.

3. Planning Ahead

This helps avoid decision fatigue, and can keep you focused throughout your day.

4. Establishing Better Default Habits

Create better options to fall back on when you are tired, overwhelmed, bored, or simply unsure of what to do with yourself.

Urgency Mindset: Assessment Quiz

The aim of this questionnaire is to give you a sense of your current urgency mindset.

You have spent time during The Focus Course to discover how meaningful productivity relates to consistently spending your time on things that matter.

But are there things getting in your way? If you are consistently spending time on the things that are *urgent*, you may never get to the things that are *essential*.

In your pursuit of doing work that matters and keeping a healthy balance between your work and personal life, it is helpful to know how prone you are to giving in to the urgent without fighting for the important.

For each question, circle the number that best represents your association with that question.

The scale is as such:

1: Rarely

2: Occasionally

3: Frequently

4: Often

5: Always

Do you seem to do your best work when you're under pressure?

1 2 3 4 5

1: Rarely 2: Occasionally 3: Frequently 4: Often 5: Always

How often do you have to deal with issues that should have been taken care of by others?

1 2 3 4 5

How often is your day spent reacting and moving from one unexpected or pressing event to the next?

1 2 3 4 5

How often do you wait until due dates to get important things done because you are overwhelmed with many competing and pressing events?

1 2 3 4 5

How often do you feel frustrated at the end of the day because your most important tasks are still not done?

1 2 3 4 5

Do you keep thinking that someday you'll be able to do what you really want to do?

1 2 3 4 5

How often do you feel frustrated by the slowness of people and things around you?

1 2 3 4 5

Do you feel guilty when you take time off work?

1 2 3 4 5

Do you assume people will naturally understand if you have to disappoint them or let things go in order to handle a crisis?

1 2 3 4 5

1: Rarely 2: Occasionally 3: Frequently 4: Often 5: Always

How often do you blame the rush and press of external things for your failure to spend time alone to think, plan, and reflect?

1 2 3 4 5

How often do you find yourself rushing between places and events?

1 2 3 4 5

How often do you find yourself giving up quality time with important people so that you can finish a project or respond to a crisis?

1 2 3 4 5

How often do you eat lunch or other meals while you work?

1 2 3 4 5

Do you feel anxious when you're out of touch with your work?

1 2 3 4 5

When you go on vacation or take time off from work, does it take you several days to stop feeling anxious about the work you have to do?

1 2 3 4 5

Total Score: _____

The higher your score, the greater your urgency mindset. Here's a scale to measure your score:

15 – 39 points: Low urgency mindset — urgency likely does not control your life.

40 – 59 points: Strong urgency mindset — there's a good chance urgency is your fundamental operational paradigm.

60 – 75 points: Urgency addiction.

Understanding and Avoiding a Strong Urgency Mindset

Stephen Covey defines Urgency Addiction as this:

Urgency addiction is a self-destructive behavior that temporarily fills the void created by unmet needs. And instead of meeting these needs, the tools and approaches of time management often feed the addiction. They keep us focused on daily prioritization of the urgent. [...]

It's important to realize that urgency itself is not the problem. The problem is that when urgency is the dominant factor in our lives, importance isn't.

If urgency is a dominant factor in your life, and the basis for which you prioritize your day, then what is at stake?

An Urgency Mindset is at direct odds with focus and meaningful productivity because it relies on external factors to dictate importance rather than internal values.

Urgency will destroy your goals.

Urgency will keep you from spending time on the essential activities that matter and which move things forward — instead you will spend your time constantly responding to the urgent issues of the day.

How to Tell What is Urgent vs What is Essential

Urgency is usually defined by *external factors*.

Things that are essential are fundamentally important, *regardless* of external factors.

Urgency, therefore is *relative* while essential is *absolute*.

With a clear understanding of what your essential activities and tasks are, then you can have clarity on what urgent matters you should give your attention to and which ones you should ignore. This liberates you to spend the vast majority of your day on only the essential activities of life, rather than giving way to the tyranny of urgent issues that are not truly important.

How to Overcome an Urgency Mindset

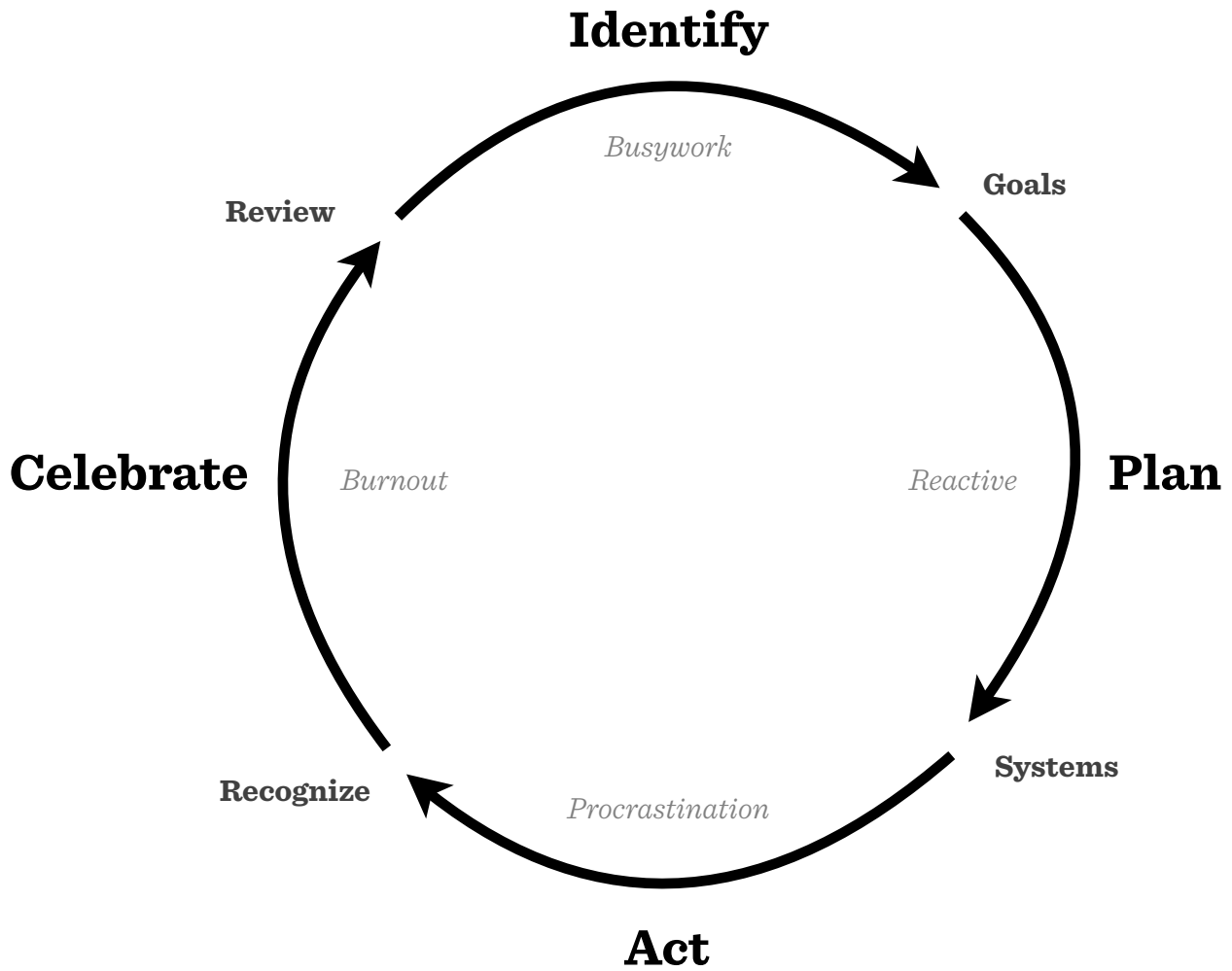
1. Identify what is essential
2. Set aside time for the essential
3. Follow through with your commitments
4. Celebrate your progress

By using the 4-Focus Method and creating a flywheel of focus in your life, you will naturally overcome an urgency mindset.

The flywheel reminds you to identify and focus on that which matters most — not simply that which is urgent in the moment. And, by both planning and celebrating your actions, you continue to prioritize and reinforce the positive actions and habits you wish to be doing.

The 4-Focus Method

A Flywheel for *Living a Focused Life*



The 4-Focus Method

1: Identify

Step one is to get clear about what is truly essential. This goes beyond just knowing what tasks are important. It also means knowing which roles of your life matter most to you. What values you prioritize. Which lead measures have the greatest impact toward your desired outcomes. Etc...

Many people struggle to identify that which matters because they lack clarity about the bigger picture of their life's mission and vision. ("People perish with lack of vision.")

2: Plan

When you have identified what is important, you must set aside time for it. Otherwise all you have is a wish or a hope that gets no traction in your life.

For some people, planning feels like a trap ... they fear scheduling their day because they know that there will be things which mess up the plan. And so they'd rather wing it in the moment and allow their schedule to stay open and spontaneous.

3: Act

This is where you actually do that which you said you would do. It will naturally include your tasks and actions, but it also includes things such as meaningful moments with your family, resting and recharging, and more. This is the part of the flywheel where you are actually spending your time *doing and living life*.

4: Celebrate

When you've done that which you set out to do, that's cause for celebration! You want to reinforce that positive actions and recognize the fact that you've just done something that matters. That way, you can continue and repeat the healthy productivity cycle.

Four Symptoms of a Busted Productivity System

1: Busywork (Spinning Your Wheels)

Doing tasks and activities that are not rewarding, they don't add up nor do they compound into anything substantial over time, and they don't really move things forward. Simply put, they're not the best use of your time. This happens when you lack clarity.

2: Reactive Work (Feeling Frustrated & Anxious)

When you find yourself reacting to the needs of others and unable to follow through with your own priorities. There is always something else coming your way that you have to react to, and you're not able to proactively focus on the things that you know you should be doing. This happens when you have no system for reliably planning and scheduling how to spend your time.

3: Procrastination (Feeling Behind)

When you and/or your team have a hard time following through on your commitments. Tasks get put off to the last minute or skipped altogether. This happens when you lack personal integrity and/or a system of execution.

4: Burnout (Feeling Overwhelmed)

When you feel like your just on the hamster-wheel of hustle. You are feeling burnt out, unmotivated, and can't see how your current activities lead toward your desired outcomes. This happens when you do not regularly recognize your progress and celebrate those small wins.

PLAN YOUR SABBATICAL

Lesson 2.3

- ✓ Using the Law of Boundaries to Your Advantage
- ✓ Alternative Sabbatical Ideas and Options

Success for this section: Schedule a sabbatical for yourself.

How to Schedule Your Sabbatical Week

It's not complicated. You just schedule it!

1. Try to schedule it for as soon as possible! (sometime in the next 4 - 8 weeks)
2. Email me a screenshot of your calendar event: shawn@blancmedia.org

Advantages of a Sabbatical Week

The point of a sabbatical is to rest, recover, and regain strength. It's also a chance to give up control.

Many business owners are held back by their belief that everything is important and that they must be at the center of all tasks, actions, and decisions. Your sabbatical is a forcing function that will require you to give up control in the non-essential areas of your business. You will have to communicate with your team. You will have to plan ahead.

(For context, I take 9 weeks of sabbatical breaks each year. And so does my entire team.)

Your current business functions as a result of the past decisions you've made. Look at the business you have right now -- your margin, your business model, your clients and customers, your workload -- all of that is a result of the decisions you've made up until this point. If you don't like it, and if you want to get different results, then you have to begin making different decisions.

Moreover, by scheduling a full week, it will force you to clarify to your team what needs to be done. It will help you plan for what needs to happen when you are out. It will allow your team to take action without you.

By scheduling your sabbatical, this will help you to:

- Break the mindset that says you need to be in control and in the loop all the time.
- Prove to yourself (and your team) that you can take time away and it will be fine.
- Take a step toward incorporating greater margin, health, and focus into your company.
- Use the Law of Boundaries to your advantage.

Alternative Options for “Partial Sabbaticals”

If you cannot take a full week off, then here are a few alternatives:

- Cancel all meetings you have for that week: all client meetings, all team meetings, etc. And don't go into the office. Clear your schedule, and work from home. You can be free to focus on critical work and creative tasks, but you're free from all obligations on your calendar.
- Just work Monday. But then take the rest of the week off.
- Reduce your work day down to 2 hours / day for the week. And then do intentionally restful, fun, silly things during the other hours of your day.

However, note that the value of a full week is because it takes a few days to decompress and then a few days to enjoy your sabbatical and get some good rest. It would be better to schedule a full sabbatical week for a bit further in the future than to do a “partial” one sooner.

My Sabbatical Week is scheduled for: _____

LESSON TWO

Wrap-up

Most Important

I identified ways to restore margin

Bonus

I took the assessments

Bonus

I scheduled my first sabbatical

Of the five different areas of margin, the one that stands out as most important to me right now is...

My key takeaway from lessons two:

Share your sabbatical plans with the Boss Board

Use the community forum and the Boss Board live call to let us know you've got a sabbatical on the books!

GOALS

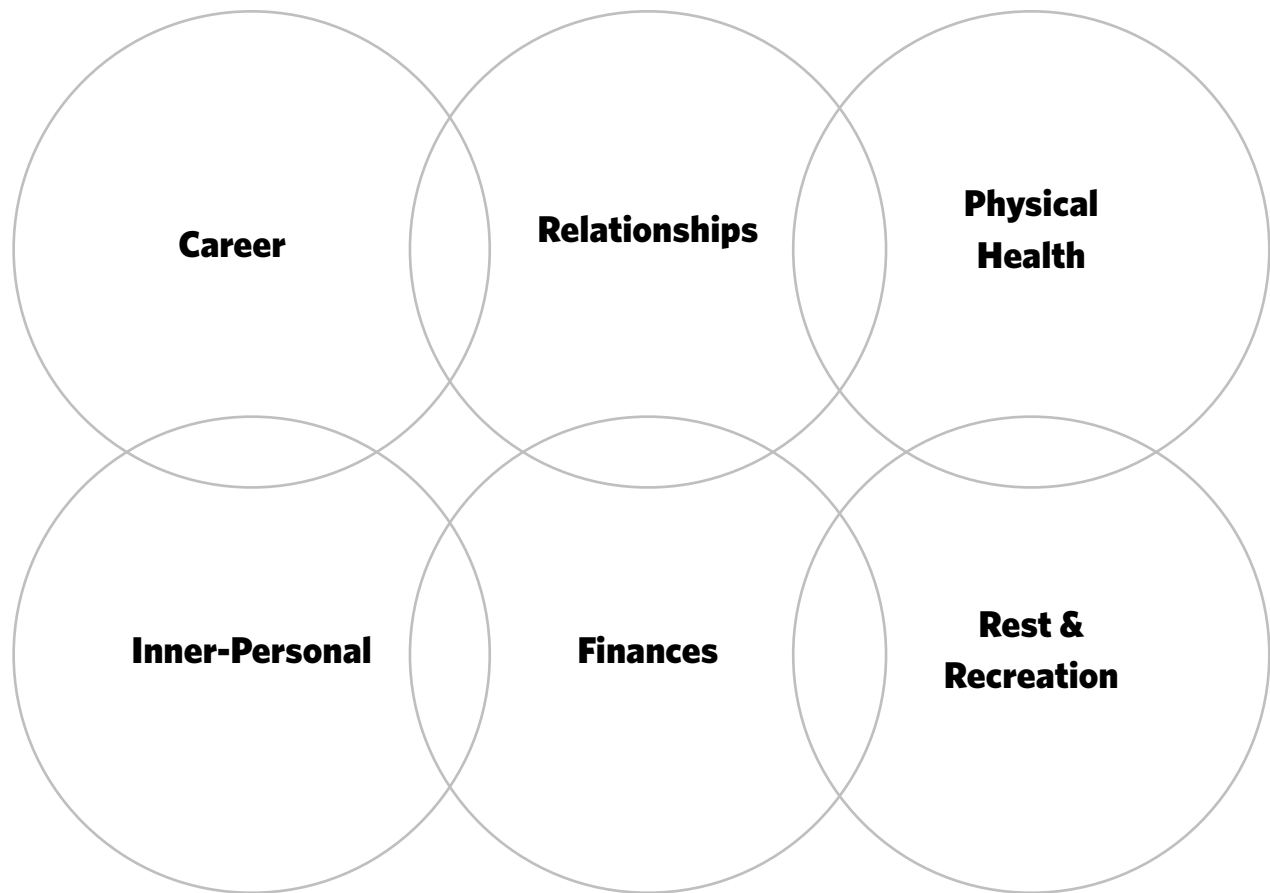
Lesson 3.1

- ✓ The Six Areas of Life
- ✓ Life Assessment
- ✓ Goal Setting & Strategy Setting

Success for this section: Complete the goal setting worksheet for at least two areas of your life.

After completing these lessons, I want to celebrate by...

The Six Areas of Your Life



All six areas of your life overlap with one another; they impact and affect one another.

When you are healthy and thriving in one area, it contributes to living healthy in the other areas...

... conversely, when you are unhealthy and struggling in one area, it can have a negative impact on the other areas.

Consider how The 8 Laws of Focus apply to each area of your life. Have you noticed how you can only ever give your full focus to one or two areas at a time? And yet there are many areas of our life that we want to maintain in a healthy state! (This is where habits and routines help.)

1: Career

The trajectory and legacy of your life's work; your business & vocation. Naturally, the specifics of your role will change throughout your career; you may wear hats in your business now that you didn't used to and you will no doubt have new responsibilities as your business changes over time.

2: Relationships

For relationships, this also can be subdivided into additional areas: your spouse / significant other; your children; your family; your friends; your employees and team members; et al. This is the social domain of your life. We also know that different relationships are stronger than others or more important than others.

3: Physical Health

This is your physical body: your health, your strength, your physical energy.

4: Inner-Personal Life

Your inner-personal life can be subdivided down into three separate areas: your emotional health; your mental health; and your spiritual life. Each of these areas of our inner-personal life stand on their own and each of them play a critical role in who we are.

5: Finances

This area of life is more than just your budget, your bank accounts, etc. It also makes up the items and things which you own and /or the things you are responsible for maintaining.

6: Rest & Recreation

This is perhaps one of the most neglected areas of our lives. There is much overlap here with how rest impacts our physical health, our inner-personal life, our relationships, and more. True rest is something that leaves us feeling recharged and rejuvenated. And, thus, it is often something which requires a bit of energy (believe it or not). Similarly to how you spend time on, in, and thinking about your vocation so too should you spend time on, in, and thinking about rest and recreation.

TODAY'S DATE:

MY INNER PERSONAL & SPIRITUAL LIFE

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY EMOTIONAL STATE

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY MENTAL STATE

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY PHYSICAL HEALTH

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY RELATIONSHIP WITH MY SPOUSE / SIGNIFICANT OTHER

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY RELATIONSHIP WITH MY KIDS

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY RELATIONSHIPS WITH FRIENDS & FAMILY

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY REST TIME, DOWN TIME, AND "PLAY" TIME

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY HOBBIES & SIDE-INTERESTS

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY JOB / CAREER

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY FINANCES

NOT GOOD...

AMAZING!

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

MY INNER PERSONAL & SPIRITUAL LIFE

What's going well?

What could be better?

MY EMOTIONAL STATE

What's going well?

What could be better?

MY MENTAL STATE

What's going well?

What could be better?

MY PHYSICAL HEALTH

What's going well?

What could be better?

RELATIONSHIP WITH MY SIGNIFICANT OTHER

What's going well?

What could be better?

MY RELATIONSHIP WITH MY KIDS

What's going well?

What could be better?

MY RELATIONSHIPS WITH FRIENDS & FAMILY

What's going well?

What could be better?

MY REST TIME, DOWN TIME, AND "PLAY" TIME

What's going well?

What could be better?

MY HOBBIES & SIDE-INTERESTS

What's going well?

What could be better?

MY JOB / CAREER

What's going well?

What could be better?

MY FINANCES

What's going well?

What could be better?

The Power of Goal Setting For Your Life

Do you ever feel stuck? Not sure what to do next? Just totally bored and lacking motivation?

Goals give you a direction and help you make progress.

When you can get clear about your goals, you can get clear about the action you need to take.

Your actions matter more than your outcomes

Over the next several pages, you are going to define your long-term desired outcomes and then begin to break those down into medium- and short-term goals, and then ultimately into small daily actions.

You cannot control your outcomes.

But you can control your actions and your effort.

Thus, the aim of this goal-setting section and the habits section that will follow is to **connect your daily actions to your long-term desired outcomes**. This is the Law of Sowing and Reaping in action.

Two Types of Goals: Attainment & Lifestyle

1: Attainment Goals

An Attainment Goal is something that you achieve or accomplish.

Attainment Goals have a clear definition of completion.

Examples of Attainment Goals:

- Buying a new home
- Graduating college
- Getting married
- Losing 5 pounds
- Refinishing the bathroom
- Running a 5k race
- Launching a new product
- Writing a book
- Paying off debt
- Etc.

2: Lifestyle Goals

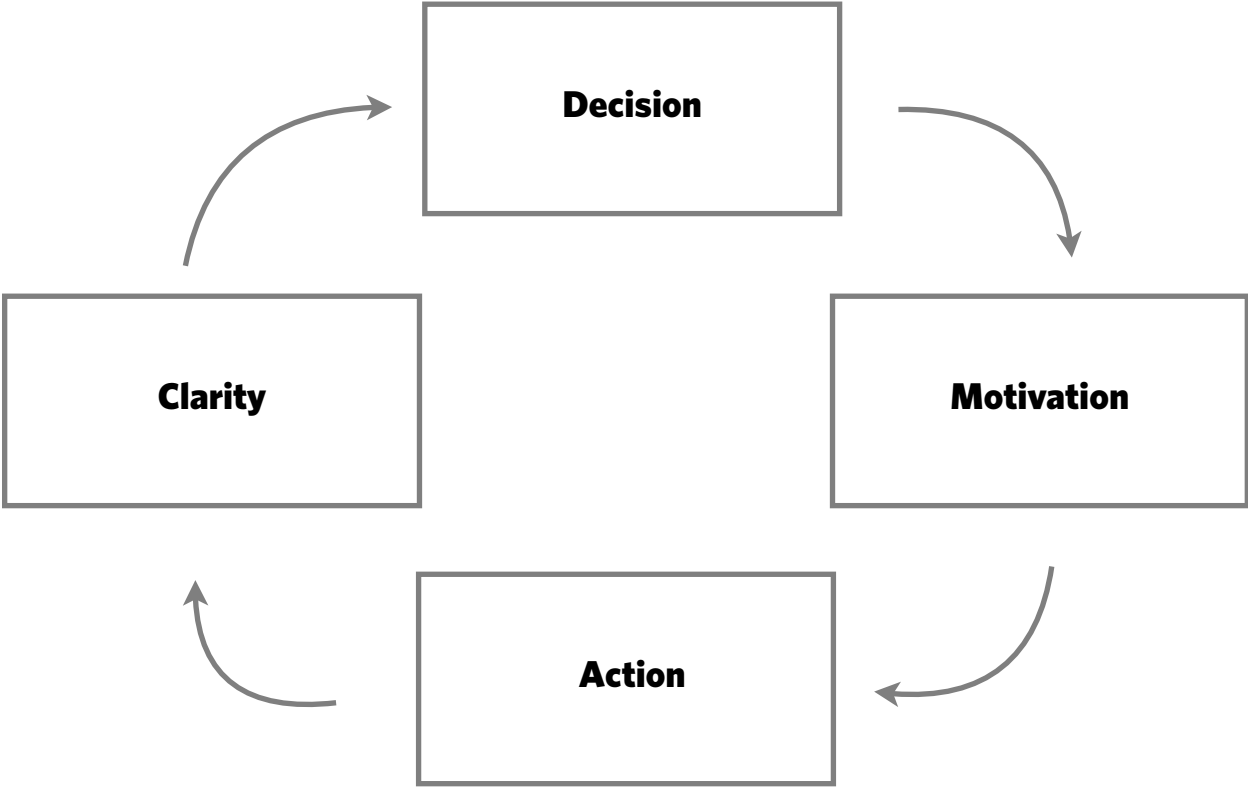
A Lifestyle Goal is something that you “install” into part of your life.

Lifestyle Goals are systems, habits, or routines that you work to incorporate into your everyday lifestyle.

Examples of Lifestyle Goals:

- Working out for 15 minutes each day
- Having a quiet time of reading and reflection in the morning
- Going to bed at a certain time
- Eating a certain diet
- Keeping a budget
- Etc.

Action Brings Clarity



(Sample) Life Goal: Spiritual / Inner Personal Life

For my spiritual / inner personal life, what is one thing I want to do, be, or have someday?

To live a less stressed and less anxious life.

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Be more informed about emotional and mental health, and also have more personal insight into how I am built and how I respond emotionally to different situations and circumstances. Knowing more about what is good for my emotions and what is difficult for me.

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Collect some quantitative data and information about how my mood is impacted (positively and/or negatively) by my activities.

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Begin a new journaling structure to track my moods, my stress, and emotions.

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Begin to research this approach to how actions, circumstances, and situations can impact emotions. Try to find some research, templates, and other ideas so that I can get started on the right foot.

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

Spend 5 minutes journaling and reflecting about my day today and what my emotions are.

What other areas of my life would see significant benefits from the actions and milestones listed here?

Inner Personal

Relationships

Physical

Rest & Recreation

Financial

Career

(Sample) Life Goal: Physical Health

For my physical health, what is one thing I want to do, be, or have someday?

I want to be in excellent health and physical condition so that I can have energy and vibrancy to enjoy my days and my life and be present and engaged with all of my most valuable relationships.

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Have a healthy diet that is best for my body, and doing regular workouts and movement as part of my normal daily lifestyle.

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Learn more about healthy eating and work with a personal trainer who can help me discover the right workouts for my fitness needs.

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Decide upon and be working with a dietitian and trainer.

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Research dietitians and trainers in my local area (or find ones that can work with me remotely online).

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

Plan a time within the next week that I will do the research for a trainer.

What other areas of my life would benefit or be impacted by the actions and milestones listed here?

Inner Personal

Physical

Financial

Relationships

Rest & Recreation

Career

Spiritual / Inner Personal Life: Prompts and help for goal setting

- Your inner personal life can be sub-divided into 3 smaller areas: Your mental health, your emotional health, and your spiritual life.
- Looking at the roles you listed in Lesson 1, do any of those relate to your spiritual / inner personal life? If so, do you already have a short- or long-term goal for that role?
- What other short- or long-term spiritual goals do you have?
- What makes life special and meaningful?
- What do you want to do?
- Who do you want to be? (Use your vision statement as a plumb line and apply it to your spiritual / inner personal life -- how can your life vision complement your spiritual / inner personal life, and vice versa?)
- Are you pleased with where you are right now in your spiritual / inner personal life?
- If you keep doing for the next year, 5 years, and 20 years what you have been doing for the past 1, 5, and 20 years, will you be pleased with who you are, where you are, and what you have?
- As you consider your someday goals, do they lead to a life that is exemplifying the values you listed during Lesson 1?
- What spiritual / mental / emotional activities will give you strength for the other areas of your life?

Spiritual / Inner Personal Life (Life Goal)

For my spiritual / inner personal life, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I can do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I can do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I can do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I can do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

<input type="checkbox"/> Inner Personal	<input type="checkbox"/> Physical	<input type="checkbox"/> Financial
<input type="checkbox"/> Relationships	<input type="checkbox"/> Rest & Recreation	<input type="checkbox"/> Career

Physical Health: Prompts and help for goal setting

- Is there a physical goal that, if attained, would bring joy and some level of ease to the other areas of your life?
- What makes life special and meaningful?
- As you consider your someday goal, does it lead to and align with the values you listed during Lesson 1?
- What do you want to do?
- Looking back at the roles you listed from Lesson 1, do any of them relate to your physical life and/or physical health? If so, do you already have a short- or long-term goal for that role?
- What other short- or long-term physical goals do you have?
- Can you use your vision statement as a plumb line and apply it to your physical life?
- Are you pleased with where you are right now with your physical health and state?
- If you keep doing for the next year, 5 years, and 20 years what you have been doing for the past 1, 5, and 20 years, will you be pleased with who you are, where you are, and what you have?

Physical Health (Life Goal)

For my physical life, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I can do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I can do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I can do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I can do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

Inner Personal Physical Financial
 Relationships Rest & Recreation Career

Relationships: Prompts and help for goal setting

- What are some of your most important relationships?
- Do you already have a short- or long-term goal for any of them?
- If you keep doing for the next year, 5 years, and 20 years what you have been doing for the past 1, 5, and 20 years, will you be pleased with the state of those most important relationships?
- What makes life special and meaningful?
- What are some of your most precious memories with people?
- What sort of person do you want to be to others? (Use your vision statement as a plumb line and apply it to your relationships — how can your life vision complement your relationships, and vice versa?)
- Do you feel that you're able to give 100% to your most important relationships without feeling burnt-out and overspent?
- Are you pleased with where you are right now in your most important relationships?
- As you consider your someday goals, do they lead to stronger relationships, generosity, kindness, serving others, and providing value?
- Your Relationships can be further broken down into important sub-groups of relationships, including your marriage and significant other, your children, your parents, your close friends, your family, those you work with, your customers and clients, etc.

Relationships (Life Goal)

For my relationships, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

Inner Personal

Physical

Financial

Relationships

Rest & Recreation

Career

Rest & Recreation: Prompts and help for goal setting

- What makes life special and meaningful? Can you incorporate that into your goal for rest and recreation?
- What does “rest” mean to you?
- Do you think you might be spending too much time in Counterfeit Rest? If so, what would things look like for you if you were resting differently and in a more healthy manner?
- Do you already have any short- or long-term goals related to rest & recreation?
- As you consider your someday goals for rest & recreation, do any of them help you become more generous and kind? To better serve others and provide value?
- Looking at your values from Lesson 1, what ways can you rest that will give you the strength and opportunity to walk out and exemplify those values?
- If you keep your same habits of rest & recreation for the next year, 5 years, and 20 years that you have had for the past 1, 5, and 20 years, will you be pleased with who you are, where you are, and what you have?
- As you look back at how you have spent your time on rest & recreation over the past few months, are you proud of that time or do you wish you would you have spent it differently? Why?

Rest & Recreation (Life Goal)

In the area of rest & recreation, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

<input type="checkbox"/> Inner Personal	<input type="checkbox"/> Physical	<input type="checkbox"/> Financial
<input type="checkbox"/> Relationships	<input type="checkbox"/> Rest & Recreation	<input type="checkbox"/> Career

Career & Business: Prompts and help for goal setting

- Who are some people whom you look up to in your field of interest?
- What does “meaningful work” look like to you?
- What do you want to do? What skill do you want to learn? What is next in your career?
- Does the idea of craftsmanship and mastery applied to your business role sound exciting to you?
- Who do you want to be?
- Are you pleased with where you are right now in your business?
- If you keep doing for the next year, 5 years, and 20 years what you have been doing for the past 1, 5, and 20 years, will you be pleased with who you are, where you are, and what you have?
- As you consider your someday goal for your business and your role within it, does it lead to a life of exemplifying your values?
- How can your business and your career empower your other goals (spiritual, physical, relational, rest, etc.)?

Career & Business (Life Goal)

For my career / business, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

<input type="checkbox"/> Inner Personal	<input type="checkbox"/> Physical	<input type="checkbox"/> Financial
<input type="checkbox"/> Relationships	<input type="checkbox"/> Rest & Recreation	<input type="checkbox"/> Career

Finances: Prompts and help for goal setting

- Are you pleased with where you are right now as it relates to finances?
- Do you have a budget and are you living within your means?
- If you keep doing for the next year, 5 years, and 20 years what you have been doing for the past 1, 5, and 20 years, will you be pleased with the state of your finances?
- Do you want to give money away and serve / help others with your finances?
- As you consider your someday goals, do they lead to generosity, kindness, serving others, and providing value?
- Do you already have a short- or long-term goal for your finances and economics?
- What makes life special and meaningful? How can your finances help make that a reality?
- Use your vision statement as a plumb line and apply it to your finances — how can your life vision complement your finances, and vice versa?
- Consider what the circumstances of your life will be in 5 years from now for the obvious things. Such as:
 - How old will your car be in 5 years?
 - Will your house be paid off?
 - What grade will your kids be in?
 - At your current rate of saving / investing / debt elimination, what will your finances look like?
 - How old will you and your spouse both be? What year of marriage will you be on?
 - How old will your parents be?

Finances (Life Goal)

For my finances, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

<input type="checkbox"/> Inner Personal	<input type="checkbox"/> Physical	<input type="checkbox"/> Financial
<input type="checkbox"/> Relationships	<input type="checkbox"/> Rest & Recreation	<input type="checkbox"/> Career

Life Goal: _____

For this area of my life, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

___ Inner Personal

___ Physical

___ Financial

___ Relationships

___ Rest & Recreation

___ Career

Life Goal: _____

For this area of my life, what is one thing I want to do, be, or have someday?

Based on my someday goal, what is one thing I could do 5 years from now that will put me on track to accomplish it?

Based on my 5-year goal, what is the one thing I could do in the next year that will put me on track to accomplish it?

Based on my 1-year goal, what is the one thing I could do in the next month that will put me on track to accomplish it?

Based on my one-month goal, what is the one thing I could do in the next week that will put me on track to accomplish it?

Based on my one-week goal, what is the one thing I could do today that will put me on track to accomplish it?

What other areas of my life would see significant benefits from the actions and milestones listed here?

___ Inner Personal

___ Physical

___ Financial

___ Relationships

___ Rest & Recreation

___ Career

***“We do not rise to the level of our goals,
we fall to the level of our systems.”***

James Clear

HABITS

Lesson 3.2

- ✓ How to use habits to change your life
- ✓ How to set priorities and boundaries
- ✓ Lifestyle habits toward your goals

Success for this lesson: Identify six lifestyle habits you would want as part of your life and which would move you toward your goals and desired outcomes from the previous week.

Using Habits and Routines to Your Advantage

With so many areas of responsibility with our life, it can feel impossible to get it all done.

Habits and routines are like *bowling alley bumpers* that help us to keep moving forward in every area of our life even when we are busy, tired, and can only focus on one big thing at a time.

Habits and routines are valuable because goals don't complete themselves.

Goals give you a direction to go. Your habits and routines will keep you moving toward progress and results

By focusing on your habits, you're able to focus on incremental improvement. And slowly, over time, your habits and disciplines become a source of joy and delight.

People are Lazy

- ✓ We run out of energy
- ✓ We take the path of least resistance
- ✓ We make emotional decisions
- ✓ We don't follow through

Habits are Smart

- ✓ They automate the inconsequential
- ✓ They help us stay healthy
- ✓ They save us energy
- ✓ They compound over time

List Any Current Habits or Routines (Positive or Negative)

Are there any areas of your life which already have positive or negative habits? If so, list below any that come to mind.

Area of Life (or a Specific Role)	Current Habit or Routine

On the following pages, brainstorm habits for each area of your life.

These habits / routines / systems should serve two purposes:

1. They should provide you with regular space and momentum in your life to make progress toward your goals.
2. They should be something that in and of themselves would be a healthy and enjoyable thing to do — something that flows from your values and your vision.
3. You can include any of the current habits you already listed above.

SPIRITUAL / INNER PERSONAL	
Habit / Routine / System / Activity	Frequency
Journaling	5 minutes every day

PHYSICAL HEALTH	
Habit / Routine / System / Activity	Frequency
Do a 30-minute workout	3x weekly

RELATIONSHIPS	
Habit / Routine / System / Activity	Frequency
Date Night	6 hours every week

REST & RECREATION	
Habit / Routine / System / Activity	Frequency
Read a book	15 minutes every day

CAREER / BUSINESS	
Habit / Routine / System / Activity	Frequency
Write for 20 minutes	Every day

FINANCES	
Habit / Routine / System / Activity	Frequency
Gratitude journal	Write one thing I'm thankful for each day

Why pick a habit for each area of your life?

Consider each of the following areas of your life, and what they may look like 5 years from now.

1. Emotional and Spiritual Life
2. Physical Health
3. Relationships
4. Career & Business
5. Finances
6. Rest & Recreation (personal interests and down time)

A singular, small action will not produce significant results in the short term. But, over time, small actions lead to big change.

- Smoking one cigarette will not degrade your health overnight.
- Going on a walk will not improve your health in one day.
- Skipping dessert one time will not impact your weight.
- Writing for 30 minutes will not produce any body of work.

But...

- What if you were to smoke a cigarette every day for the next 3 years?
- What if you went on a brisk walk every day for the next 3 years?
- What if you wrote for half an hour every day for the next 3 years?

“We do not decide our futures, we decide our habits.

And our habits decide our futures.”

F.M. Alexander

Choose A Habit to Change Your Life

On the following pages you are going to identify a single lifestyle practice or habit that you would like to incorporate into your life.

Pick one idea from the list of habit ideas you listed on the previous pages.

For each activity list the time commitment it will require or that you want to give it, and also list the frequency (since some lifestyle practices do not occur daily).

Then, fill in the value statement for that activity, giving the bigger context for why this activity is valuable to you and your desired outcomes in that area of your life.

(Sample) Physical

Engage in vigorous exercise that builds my strength and cardio	15 minutes	Daily
Habit / Routine / Lifestyle Practice	Time Commitment	Frequency

This activity will move me toward my physical health goal of being in excellent health and physical condition so that I can have energy and vibrancy to enjoy my days and be present for relationships.

because one of the most important factors to physical health and energy is regular movement and

exercise. And so, if I can build a regular habit of exercise — even just 15 minutes a day — that is

something that will serve me and help me for years to come.

Continue, by filling out the charts on the following pages...

Spiritual / Inner Personal

Habit / Routine / Lifestyle Practice	Time Commitment	Frequency

This activity will move me toward my inner personal goal of _____

because _____

Physical

Habit / Routine / Lifestyle Practice	Time Commitment	Frequency

This activity will move me toward my physical health goal of _____

because _____

Relationships

Habit / Routine / Lifestyle Practice	Time Commitment	Frequency

This activity will move me toward my relationships goal of _____

because _____

Rest & Recreation

Habit / Routine / Lifestyle Practice	Time Commitment	Frequency

This activity will move me toward my rest & recreational goal of _____

because _____

Career

Habit / Routine / Lifestyle Practice	Time Commitment	Frequency

This activity will move me toward my career goal of _____

because _____

Finances

Habit / Routine / Lifestyle Practice	Time Commitment	Frequency

This activity will move me toward my financial goal of _____

because _____

LESSON THREE

Wrap-up

Most Important

I filled out two or more goal setting worksheets

Most Important

I came up with ideas for six lifestyle habits

Bonus

I took the life assessment

Of my six different lifestyle habits, the one that stands out as most important / exciting to me right now is...

My key takeaway from this lesson:

Share your answers with the Boss Board

Use the community Slack channel and the Boss Board live call to share your ideas for lifestyle habits and any other takeaways or “ah-ha” moments.

BUSINESS VALUES

Lesson 4.1

- ✓ Values & Strengths of Your Organization
- ✓ Business Core Values

Success for this section: Identify the 3 - 5 core values of your business.

After completing these lessons, I want to celebrate by...

Meaningful Productivity & A Focused Company

Meaningful Productivity is the state of consistently giving your time and attention to the things that are most important.

The strategies and actions of you and your team must be based on the vision and values of your organization.

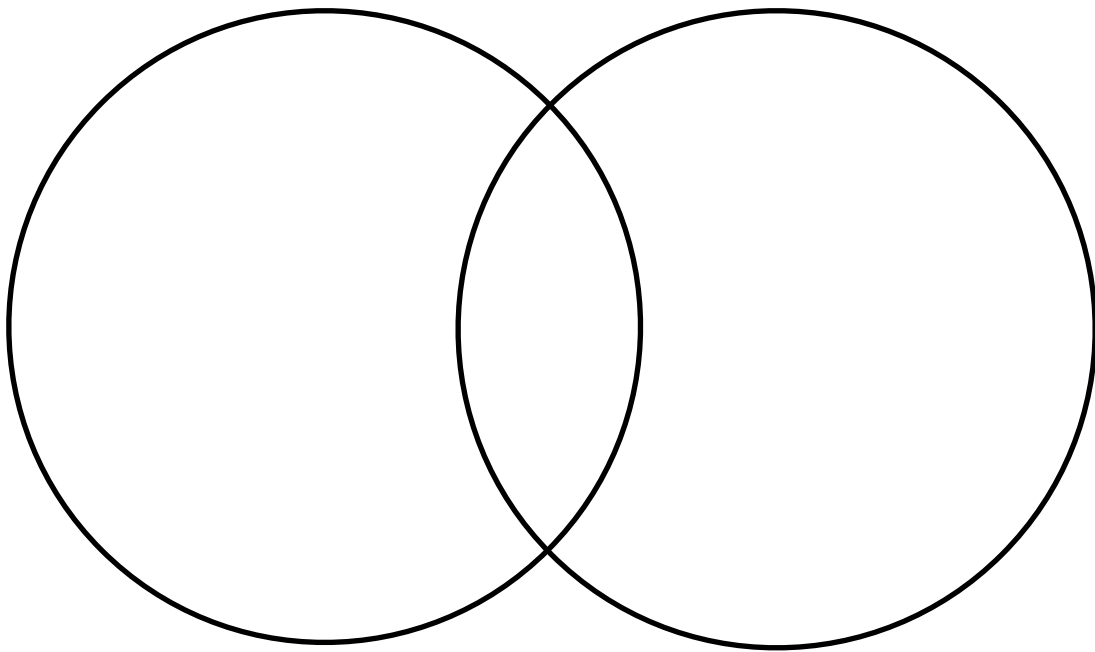
This is why you must start with your organization's mission and values before seeking to define what it looks like to be intentional and productive (not just busy) in each area of your life.

Business tactics that promise big breakthroughs apart from your own foundation of values and vision are merely skin deep and will not last.

If you are running in circles and struggling to make progress in your business, it may be that you are listening to the advice of others and executing on backwards tactics and mis-aligned strategies. You must be clear on what you want for your business — that which can be sustainable, fun, and easy for you to consistently do over time.

It is important to identify *what matters to you and your company* before you set goals, change your strategies, or experiment with new tactics. Running a business is tedious, hectic, and full of challenges. If you are spending your time on things that are not important, it will be nearly impossible to maintain motivation for yourself and your team, and to find enjoyment within the tensions and pressures of business.

The starting line of a focused and productive company is to have clarity on your vision and values. Your Business Mission Map will give you that.



*A Focused Company brings its actions
into alignment with its vision and values.*

Your Three Jobs as a Leader

Donald Miller lists the three jobs of a leader from his book, *Business Made Simple*:

1. **The number one job of a leader** is to wake up every morning, point to the horizon, and let everybody on the team know where the organization is going.
2. **The number two job of a leader** is to explain, in clear and simple terms, why the story of going to and arriving at the specific destination matters.
3. **The number three job of a leader** is to analyze the skills and abilities of each team member and find them an important role to play in that story.

As you create your Business Mission Map and Critical Actions, you will have a compelling vision for: (1) where you are going; (2) why it matters; and (3) what you're doing about it.

Don't Build a Backwards Business Strategy

You must start with the vision and values of your business. You will use this to direct where you and your team spend your time, energy, and attention.

Many business owners — especially “accidental entrepreneurs” — do it backwards. They allow their time and energy to be spent on things that are important to *other* people.

The core values of your business drive the choices you make as you grow, prioritize, and navigate the day-to-day whirlwind of your organization.

There are endless options for how to grow and run your business. And there is no singular path to success — it's not a cut and dry roadmap. So, when you're not sure what to do in a situation, your business's core values can help.

Moreover, as your business grows, new opportunities and threats will present themselves. Your Mission Map will help you (and your team) choose what to do in those times and how to prioritize your options and your actions.

Business Values Bring Clarity

Your Business Mission Map is a simple document that brings clarity and direction to your organization. You'll be able to use it for:

- ✓ Decision making
- ✓ Prioritizing new ideas
- ✓ Prioritizing opportunities
- ✓ Navigating the day-to-day whirlwind of life inside the organization
- ✓ Establishing critical actions (the everyday routines that drive your business forward)

You business functions as a result of the decisions you make and the actions you take.

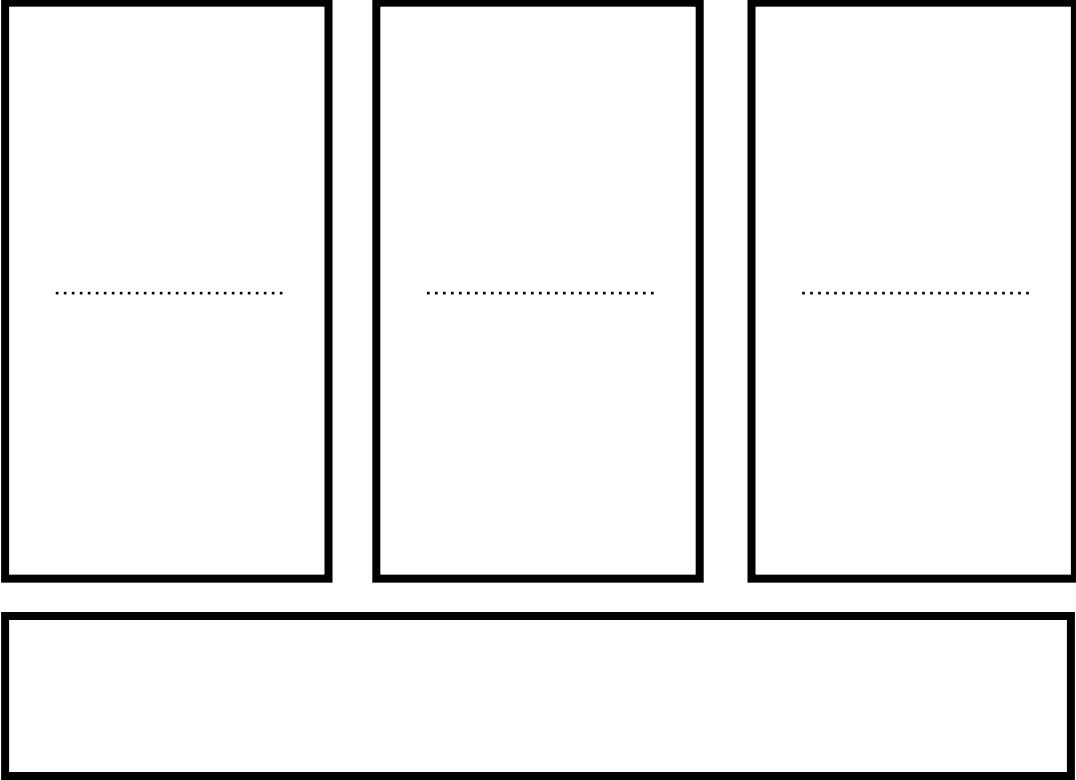
Getting clear on your company's values and focus is the next step for you toward building a business that you love, doing work you love, with a team you love, serving clients and customers you love.

You, as the business owner, need to ensure that the values of your business align with your own values.

Nobody thinks and feels about your business as much as you do. Your business values and focus must excite you and play to your strengths.

Do the values of your business exemplify the things that you, the owner, also care about?

Three Components of an Effective Organization



Clarity means identifying what matters. This is comprised of your vision, values, core focus, and desired outcomes.

Strategy is your plan of action for how you will accomplish your vision and goals. This component is comprised of your business model, marketing story, critical actions, lead measures, and key projects.

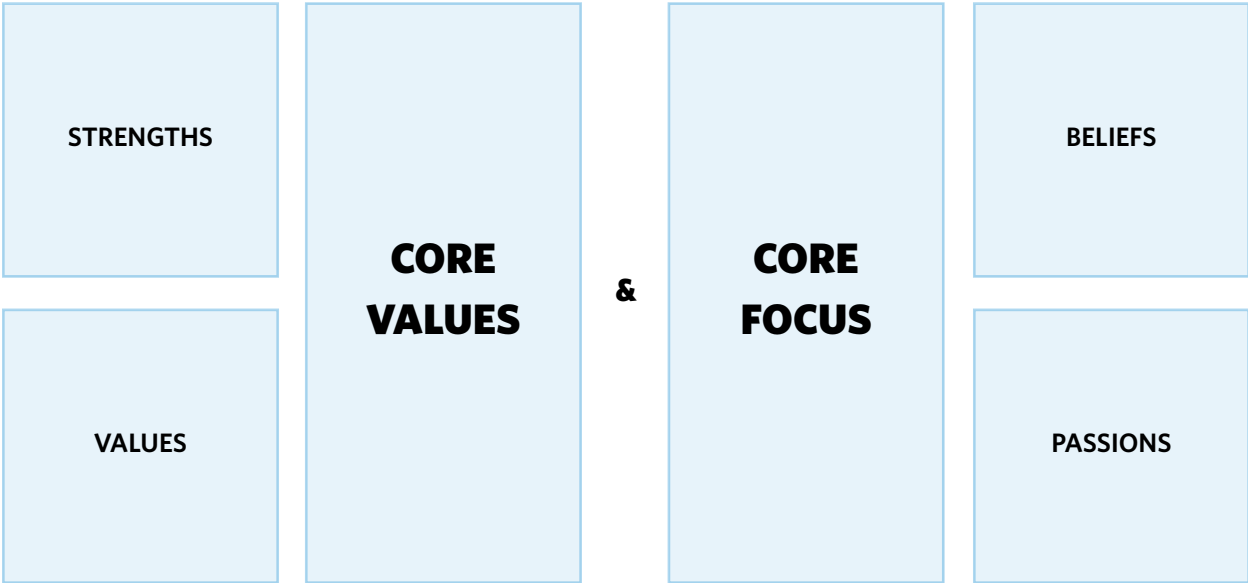
Productivity is how you and your team actually get the work done. This is comprised of the systems, tactics, communication standards, and management tools you use to deliver your product and run your organization.

Margin (bonus) serves as a foundational component to provide the capacity, breathing room, and strength required for a sustainable business. Margin is the space between your load and your limit and includes business areas such as finances, workload, and schedule.

Elements of Your Business Mission Map

Your Business Mission Map contains your **Core Values** and your **Core Focus**. (In a future lesson you will use your mission to identify business goals and the actions you can take to move you toward those goals.)

To create your **Core Values**, we'll begin by listing out the strengths and values of your team, yourself, and your organization in general. Then simplify those into a short list of core values. Secondly (in Lesson 4.2) we'll create your **Core Focus** by listing out what your company believes, what your passions are, and then simplifying that into a **Core Focus** that answers the question of why your company exists.



Your Team: Strengths & Values of Individuals

Employee

Role

WHY DID YOU HIRE THEM?

WHAT ARE THEIR STRENGTHS?

WHAT VALUES DOES THIS PERSON BRING TO YOUR COMPANY?

WHAT DOES THIS PERSON BRING TO YOUR TEAM THAT YOU WOULD LACK OTHERWISE?

Your Team: Strengths & Values of Individuals

Employee

Role

WHY DID YOU HIRE THEM?

WHAT ARE THEIR STRENGTHS?

WHAT VALUES DOES THIS PERSON BRING TO YOUR COMPANY?

WHAT DOES THIS PERSON BRING TO YOUR TEAM THAT YOU WOULD LACK OTHERWISE?

You: Strengths & Values of The Boss

YOUR PERSONAL CORE VALUE (FROM LESSON 1)

YOUR PERSONAL CORE VALUE (FROM LESSON 1)

WHAT ARE YOUR STRENGTHS?

What do you bring to the organization that would be lacking otherwise?

WHAT ADDITIONAL VALUES DO YOU BRING TO YOUR COMPANY?

IF EVERYTHING WAS BEING HANDLED PERFECTLY, WHAT WOULD YOU WANT TO BE DOING FOR YOUR COMPANY? WHAT STRENGTHS AND VALUES WOULD THAT EXEMPLIFY?

Find and Circle 10 Business Values

From the list below, **circle 10 - 15 values and virtues that stand out to you** as those which you consider most important and which make your business unique.


Action-Oriented	Adaptability	Adventurous	Ambitious
Assertive	Authentic	Belonging	Caring
Cheerfulness	Communication	Community	Compassionate
Consistency	Confidence	Conviction	Courageousness
Courteous	Curiosity	Decisiveness	Delightfulness
Diligence	Empathy	Excellence	Excitement
Focused	Forgiveness	Friendliness	Full of Integrity
Generosity	Grace	Gusto	Happiness
Hope	Humility	Independence	Joyfulness
Justice	Kindness	Knowledge	Leadership
Listener	Loving	Loyalty	Mannerly
Open-Mindedness	Organized	Parenting	Passionate
Patience	Personable	Promptness	Respectfulnes
Rest	Self-Sufficiency	Sober-Mindedness	Sound Judgment
Stewardship	Studious	Sympathetic	Teachable
Tidiness	Trustworthiness	Uniqueness	Unity
Unselfishness	Usefulness	Vision	Vulnerability
Wealth	Wholeheartedness	Wisdom	Wonder
_____	_____	_____	_____
_____	_____	_____	_____

Write in your own, unique values in the spaces provided if you don't see what you want in the values already listed.

The Core Values of Your Business

What makes you unique!? What informs your decisions and priorities?

Review the lists you created and see if you can consolidate the strengths and values of your team, yourself, and your organization down into **8 or fewer core values for your business.**

 **Write Your Values as Simple Action Statements.** A value must be something you act on and express in everyday life. Examples: Build Community; Default to Generosity; Function Over Form; Fight for Margin.

1	
2	
3	
4	
5	
6	
7	
8	

BUSINESS FOCUS

Lesson 4.2

- ✓ What do you believe?
- ✓ What are your company's passions?
- ✓ Define your Core Focus

Success for this section: Identify the Core Focus of your organization.

What do you believe?

What are some statements, ideals, behaviors, mental models, and other soundtracks that you have found to be important and true for your business and the work you do?

❤️ Example: Here are a few things we believe at Blanc Media (even though these are not all expressly stated in our values or mission). We believe: in showing up every day; that action brings clarity; delight is in the details; done and shipped is better than perfect; clarity cures busywork; margin is for relationships; joy is the journey; show up every day.

Why do you exist?

Simplify your beliefs, passions, purposes, into a simple and singular core focus. What is the mission and vision of your company? Keep it as short, simple, and concise as you can.

Our Core Focus



For example, the Blanc Media Core Focus:
We exist to help people get clear and take action.

Notes

LESSON FOUR

Wrap-up

Most Important

Identified the Core Values of my business

Most Important

Identified the Core Focus of my business

Bonus

Celebrated the completion of Lesson 4

Something surprising, interesting, exciting, or otherwise noteworthy about my business core values...

Something surprising, interesting, exciting, or otherwise noteworthy about my business core focus...

Share your answers with the Boss Board

Use the community channel and the Boss Board live call to share your business core values and core focus with us!

BUSINESS GOALS

Lesson 5.1

- ✓ Dream about the future
- ✓ Short- and long-term goals for your business

Success for this section: Identify the 1 - 3 business goals

After identifying a few business goals, I think I will celebrate by...

Setting Goals for Your Business

Your mission, should you choose to accept it...

The strategies and actions of you and your team must continue to be based on the vision and values of your organization.

Now that you have identified the Core Vision and Focus of your organization, it's a perfect time to make sure you have clear goals and desired outcomes.

If you had to stop everything you were doing and could only pursue one goal what would that be?

The power of goal setting for your business is that it lets everyone know exactly what it looks like to win.

With clear goals and actions, everyone on your team knows the target they are aiming for, and everyone knows the role they play in order to reach that target. It's liberating!

You will never grow your business by simply showing up, reacting to issues, and putting out fires every day. You must have clarity about where you are going and then do the things required to get you there. It sounds elementary, but **I am shocked at how many small business operate on a day-to-day basis with very little discipline to consistently do the things that drive growth in their business.**

If you are spending your time on things that are not important, it will be nearly impossible to maintain motivation for yourself and your team, and to find enjoyment within the tensions and pressures of business.

The Power of Goal Setting For Your Business

Do you and your team ever feel stuck? Unsure of what to do next? Lacking motivation and spinning your wheels?

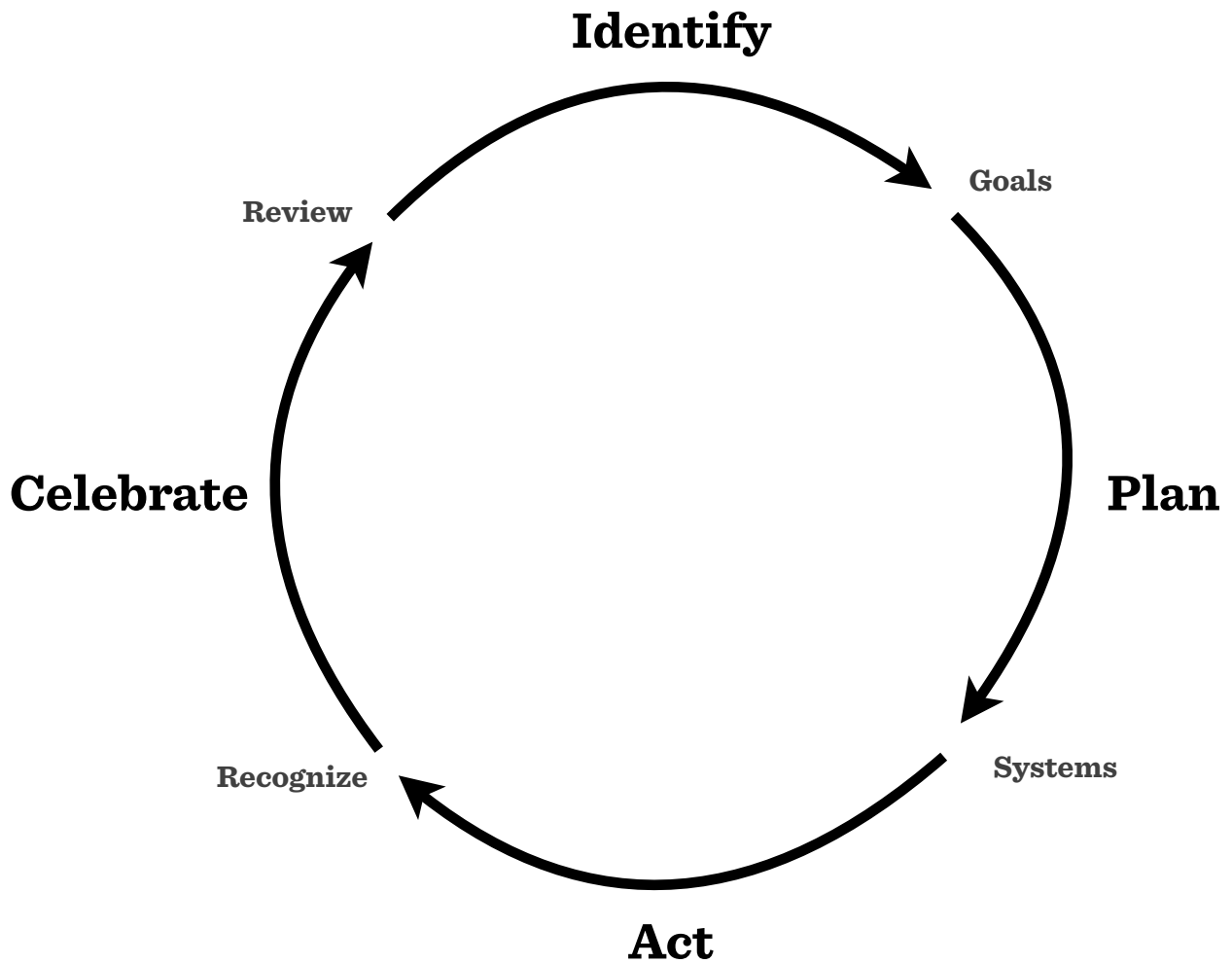
Goals give you a direction and help you make progress.

When you can get clear about your goals, you can get clear about the action you need to take.

Goals help you and your team move from a passive / reactive state to an intentional and proactive one.

The 4-Focus Method

A Flywheel for *Running a Focused Business*



1: Identify

Many business owners and leaders struggle to identify that which matters most. They lack clarity about the bigger picture of their life's mission and vision as well as that of their company. ("People perish with lack of vision.") Getting clear is hard work, and it is your vital role as the boss.

2: Plan

When you have identified what is important, you must set aside time for it. Otherwise all you have is a wish or a hope that gets no traction in your business.

3: Act

This is where you and your team do that which you said you would do — keep the most important, critical actions as front and center. Use your project management tools, systems of execution, and team communication to stay focused on the most important.

4: Celebrate

When you've done that which you set out to do, that's cause for celebration! Reinforce your positive actions and recognize that you've just done something that matters. Then review what you are doing to ensure it is working and moving you toward your goals.

.....

Which of the 4 steps in the flywheel is STRONGEST at your company?

Identify

Plan

Act

Celebrate

.....

Which of the 4 steps does your company most often SKIP OR IGNORE?

Identify

Plan

Act

Celebrate

Imagine Your Business 5 years from now

If you're like myself and many other business owners, your long-term goals for the business are a bit hazy. You want your business to be *bigger*, to be *easier to operate*, to be *more profitable*, more *fun*. That's fine, but it's too abstract to be helpful.

You cannot accomplish something that is abstract.

Your goals need to be concrete and clear.

However... it can be extremely difficult to nail down one clear and specific target that you want for 5 years down the road.

Try this instead...

On the following page, imagine elements of your dream life and dream business that you would like.

Imagine a dream state of your business and your team and your clients and your products. Some of these elements may already exist and some may still be on the horizon.

- How many hours will you work each week?
- What do you want the culture of your business to be?
- What is the size of your dream team? What roles will exist within your company?
- What products / services will you offer? What will you be charging?
- What pain points do you have now that will be solved? (How will they be solved?)
- What time do you wake up in the morning? What time do you start work?
- What are your responsibilities?
- What tasks are you doing? What tasks are you NO LONGER doing?
- What meetings do you attend? What meetings do you NOT attend?
- Who else is part of those meetings?
- Are you traveling? If so then where to, what for, and how often?
- What is your take-home salary?
- What do you think your business revenue will be in order for all that to be true?

In 5 years from now, the date will be: _____

My Life and Business in 5 Years...

What do you imagine that your dream life, business, and team will look like in 5 years?



List the goals and targets you have right now

Take a few minutes to list out all the goals, projects, and other desired outcomes you have in your business right now. These can be currently active goals or perhaps they are “someday maybe” goals, or even just things you have been holding onto in the back of your mind.

Consider also: What are the biggest pain points and bottlenecks in your business right now? What are the greatest opportunities before you right now? Are your current actions and projects serving your Core Focus?

Using the space on the following pages, write down any business goals you have right now:

Questions to Ask About Your Goals

Right now you may be feeling overwhelmed and excited at the same time. Overwhelmed at all the things you “have to do” yet excited at all the potential for the future.

I have good news and bad news: you cannot do it all right now.

You have painted a picture of the long-term desired outcomes for your business and life; and you have listed all the things happening right now. Next we’ll take all this and edit it down into something you can focus every day.

Before you choose the one or two goals you want to focus on, here are some questions to consider about the goals:

Questions to ask when making decisions and commitments

Think past the short-term needs and pressures of the business right now. Think ahead, and do your future-self a favor by building a company that will be easier, faster, and more exciting to work in.

- ✓ Does this decision / commitment / project align with our Core Values?
- ✓ Does this decision / commitment / project / goal serve our Core Focus?
- ✓ Does this create more margin for ourselves, the business, and/or for our customers? (If not, what will we do about that?)
- ✓ Is this decision / commitment / project going to make our life more busy and more complicated?
- ✓ Is this decision / commitment / project going to make the company heavier, slower, and more complex than necessary?
- ✓ Does this decision contribute to greater profits and/or new sources of revenue?
- ✓ In 6 - 12 months from now, will this decision / commitment / project cause us to feel less or more excited about our Core Focus and Flagship Offer?

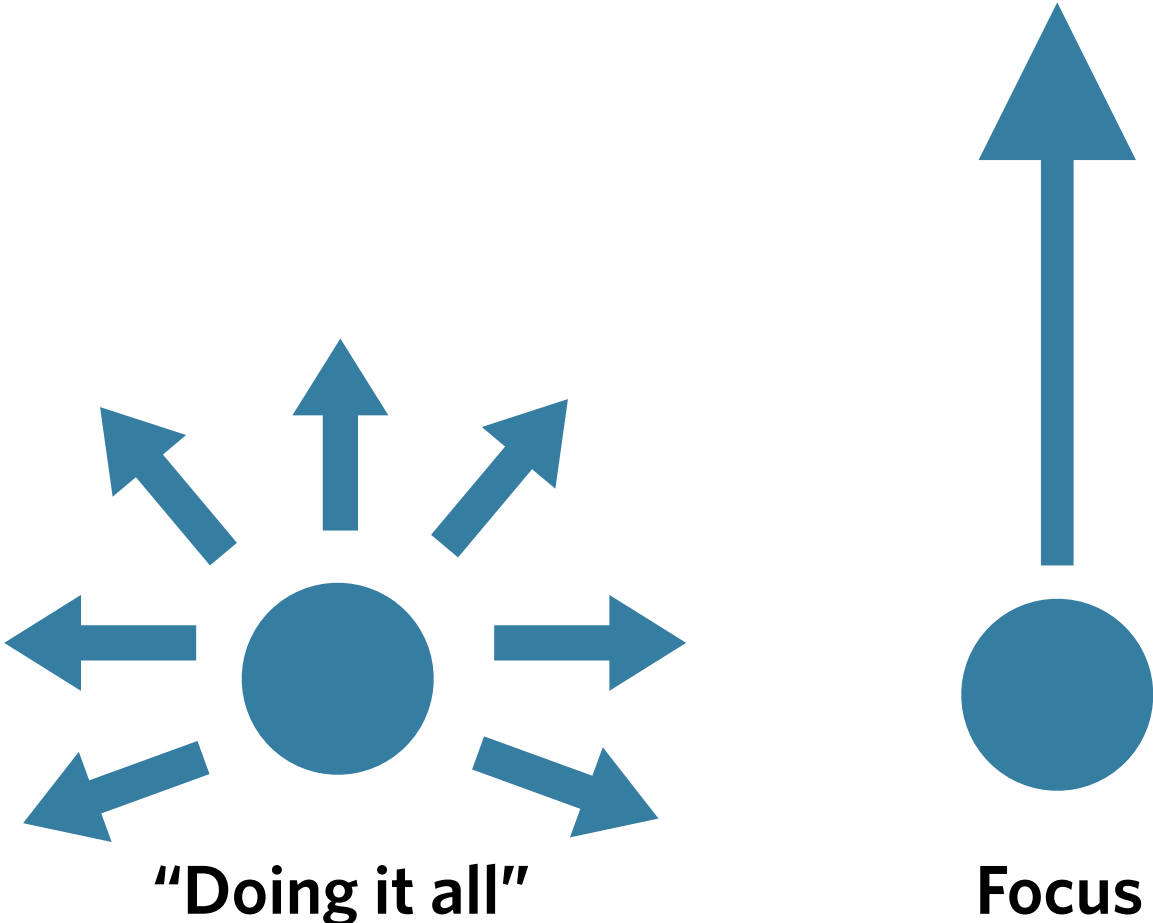
Progress Requires Focus

You are getting very close to the point in Focus Like a Boss where you will no longer need any more information. It will soon be time to take action.

A focused life is a life of action. You cannot run your company passively. The Law of Action requires that you engage with your values, pursue your goals, and follow through with your commitments. It means proactively directing your attention on that which matters. There is one thing that all successful business owners have in common: they have a strong bias toward action. Don't let ideas sit around. Don't wait for goals to just happen. Show up every day and do the most important work.

Where you direct your attention, that is the direction you will go. Our mind does not easily differentiate between "positive" or "negative" focus; we simply focus on that which we are giving our attention to.

Use The Law of Attention to your advantage. What you and your team direct your focus on is what you will move toward. Thus, direct your focus on the positive directions and desired outcomes you want.



Goal Setting Best Practices

Alas, you can't do it all. You can do just about anything you want, but you cannot do everything you want.

Review: Look over your, goals, projects, and desired-outcomes from the previous pages.

Remove: What goals, projects, and events don't align with your Core Values and Focus?

Rewrite and Refine: In the boxes on the next page, write down the medium- and short-term goals you want to focus on.

.....

Set goals that are clear, can be measured, and have a defined timeline.

With clear and measurable goals, you will be able to know — and celebrate — when you've achieved them. It will also help you to know what actions to take in order to make real progress (which we will get to in the next section).

Example Goals

Try this formula for writing your goal: **From X to Y by when?**

- *From \$85,000 in MRR to \$150,000 in 24 months from now.*
- *We will have a new core offering identified and developed in 18 months from today.*
- *From \$100,000 in employee profit sharing to \$150,000 by the end of next year.*
- *Increase my time off each year from 2 weeks to 6 starting this January.*
- *From 0 to 300 new membership subscribers within 6 months of launch.*

Most Important Goal for 2 - 3 Years From Now...

The medium-term business goal I want to focus on is:

I want to focus on this goal because...

Most Important Goal in 6 - 12 Months...

The short-term business goal I want to focus on is:

I want to focus on this goal because...

***“When it comes to our actions,
disorder and distraction are death.”***

Ryan Holiday

CRITICAL ACTIONS

Lesson 5.2

- ✓ Brainstorm Actions
- ✓ Identify Your Critical Actions
- ✓ Write Your Goal Story

Success for this section: Identify a critical action for your organization that serves as a controllable measure of effort that will drive success and the accomplishing of your desired outcomes.

What are Critical Actions?

How will you know if you have achieved your goal without some sort of measurement? The 4DX model (from the book “*The 4 Disciplines of Execution*”) describes two types of measurements that are crucial to differentiate between: Lag Measures and Lead Measures.

Lag Measures are the things that have already happened. Such as revenue earned in Q1, pounds lost, monthly page-views, words written. This data is helpful, but it cannot be changed; it is a reflection of what has *already* taken place. You cannot influence this data in any way.

However, you can use your Lag Measure data to identify behaviors or actions that have the potential to change future results. These new behaviors / actions are your Lead Measures.

Lead Measures are high-impact behaviors that will drive the success of your future Lag Measures and move you toward your goals. Lead Measures are actions that have a direct correlation to impacting the lag: If you do X then Y will happen. If you don't do X then Y will remain unchanged. Lead Measures are the critical actions you have control over.

Lead Measures have two important characteristics:

- ✓ **Predictive of achieving the goal.** *If we do this thing, we know that we will see our lag measure move as a result.*
- ✓ **Influenceable by the team.** *This behavior or action is something everyone on the team can control. It's something they can do.*

Your actions matter more than your outcomes.

Because you cannot change your lag measures, it is far better to be clear on your Lead Measures and to focus your energy on that which you can control: your actions and your effort.

***You cannot control your outcomes.
But you can control your actions and your effort.***

Examples of Critical Actions

Below are a few real-life examples of a business Focus + Goal + Action.

Housewife Cafe

A neighborhood cafe close to the Blanc Media offices (a.k.a. our favorite lunch spot).

Mission: to host their customers and create a space for community

Goal: To operate a profitable restaurant with many repeat customers and “regulars”.

Critical Action(s): (1) Daily posting on Instagram with sayings like: “we can’t wait to see you; here’s what we are serving this week; we’ve saved a spot for you; etc.”; and (2) Keeping the restaurant constantly clean and tidy so there is always a spot to sit.

The Sweet Setup

Our website that publishes app reviews and productivity workflows.

Core Focus: To help Apple power users be more productive and creative.

Goal: To grow the readership base by 3,000 new subscribers each month.

Critical Action: Publish one new article each week with a relevant call-to-action.

Focus Accelerator Membership

Our monthly membership program for knowledge workers and creative professionals.

Mission: To provide tools, training, and community for those who want to live a more focused life.

Goal: Keep monthly membership churn at or below 5% on average.

Critical Action: Book a 20-minute, 1-on-1 strategy call for each new Accelerator Member.

Additional Critical Action Examples

A singular, small action will not produce significant results in the short term.

But, over time, small actions lead to big change. In the same way that this is true for your personal life, it is also true for your business.

This is why it is so important to identify what works and then stick with it.

Here are some of the Critical Actions (Lead Measures) we do consistently:

- ✓ Personalized Loom videos to our mastermind groups to help maintain engagement and connection.
- ✓ Monthly Focus Digest newsletter to entire list to help keep non-members aware of what is happening behind the scenes and invite them to sign up for the membership.
- ✓ Weekly 2x2 newsletter to enter list and posting on social and on our blog to provide ongoing value to our community and stay top-of-mind with our readers.
- ✓ Weekly Boss Board calls to help drive FAB membership success.
- ✓ Writing every day for fresh content development and clarifying of ideas.
- ✓ Documenting our operating procedures so nothing gets overly complex.
- ✓ Budgeting (automated profit, tax, investing) keeps us financially healthy.
- ✓ Taking a Sabbatical Week at the end of every Work Cycle to maintain margin, focus, and efficiency as a team.

Pro Tip: Focus on Profitable Actions

If your business is profitable, you can do anything! Focus on the critical actions that will drive revenue so that the most-important, repeatable, and influenceable tasks your team does are the same actions which are predictive of profitability and sustainable revenue.

Urgency Will Destroy Your Goals

Keep this in mind:

Everything in your business wants to stop you from doing your singular critical action. This is the tyranny of the urgent.

When it comes to the daily tasks and issues of your business, as well as the critical actions that drive future results, you must be able to do both. You and your team must be able to walk and chew gum at the same time.

1. You must be able to manage the daily swirl of activity, issues, and tasks that come your way. (The urgent issues.)
2. You must ALSO be able to handle the above without ignoring the Critical Actions that will move you forward toward your goals and grow your business. (The essential issues.)

This is why margin is critical.

Margin enables breathing room. Margin provides the space you and your team need to think, design, and do the long-term, forward-thinking work. And, when in doubt, default to that which is essential.

Brainstorm: Critical Actions for 2 - 3 Year Goals

Business Core Focus: _____

Medium-Term Goal: _____

Below, list some ideas of Critical Actions (Lead Measures) that are within your control to do and which are predictive of achieving your 2 - 3 year goal.

A large rectangular area with alternating light gray and white horizontal bands, intended for listing critical actions.

Critical Actions for our 2 - 3 Year Goal

From your list of ideas on the previous page, pick one Critical Action you feel will be the most impactful and the most within your control to maintain. Now, fill in the details below.

Critical Action	Owner	Frequency

I believe this activity will move us toward our 2 - 3 year goal of _____

because _____

We will know it is working if _____

We will measure our progress once each day | week | month | quarter.

Critical Actions for our 6 - 12 Month Goal

From your list of ideas on the previous page, pick one Critical Action you feel will be the most impactful and the most within your control to maintain. If your short-term action goal is the same as your medium, then skip this page.

Critical Action	Owner	Frequency
-----------------	-------	-----------

I believe this activity will move us toward our 6 - 12 month goal of _____

because _____

We will know it is working if _____

We will measure our progress once each day | week | month | quarter.

Bonus: The Goal Story

Here at Blanc Media, as part of our project planning process that happens during every Work Cycle, we will write out a goal story for each of the projects and goals that we commit to.

This is something you will discover more about in a future lesson, but it also makes sense in this context and so here is an example of how it could work when identifying a goal and committing to a critical action.

Goal Story Template

Here at [COMPANY], we are focused on [CORE FOCUS]. And right now, we want to [GOAL] by [DEADLINE] because [MOTIVE].

A potential obstacle is _____. But I believe we can overcome it by _____.

Therefore, we commit to [CRITICAL ACTION(S)].

EXAMPLE:

Here at Blanc Media we are focused on helping people get clear and take action. And right now, as a business, we want to serve 50 small business owners in our Focus Like a Boss program during the upcoming calendar year because it will simultaneously help us reach our financial targets while also keeping us focused on the product that is creating the greatest impact for our ideal customers.

An obstacle to our goal is a lack of awareness of our program by our ideal customers. But we believe that we can overcome it by focusing on word of mouth and referrals from current program members as the primary engine to help us grow.

Thus, we commit to providing a delightful and impactful program experience by (1) spending at least 90 minutes each week to ensure that all current FAB members are succeeding; (2) finding at least 2 unique ways to surprise and delight our members; and (3) creating a systematized process for letting our current members know how they can help refer new members.

Write Your Goal Story (Optional)

If you want, try to write your own Goal Story in the space below. You'll see that there are already many overlapping elements with the goals, actions, and motives that you have already identified on the previous pages. Feel free to copy and paste from the work you have already done.



LESSON FIVE

Wrap-up

Most Important

Identified a medium-term goal for my business

Most Important

Identified a short-term goal for my business

Most Important

Identified a Critical Action for my business

Something surprising, interesting, exciting, scary, or otherwise noteworthy about my goals...

Something surprising, interesting, exciting, or otherwise noteworthy about my critical actions...

Share your answers with the Boss Board

Please hop over to the community channel and the Boss Board live call and share the Critical Action(s) of your business with us!

MILLION-DOLLAR SCHEDULE

Lesson 6

- ✓ Tracking your time
- ✓ Ownership Matrix
- ✓ Drafting an updated schedule

Success for this section: Draft an updated version of your weekly schedule that gives proper time for your critical roles and actions, while removing unnecessary activities that no longer fit.

After drafting my updated, Million Dollar Schedule, I am absolutely going to celebrate by...

Track Your Time for One Week!

Take the next week and track how you are spending your time and energy.

Specifically: be sure to log how much time you are spending on the tasks, routines, meetings, and other responsibilities that you are spending your time on.

The value of tracking your time on a daily basis (as opposed to simply trying to remember where your time goes) is that you get much more accurate data. Both in terms of actual tasks and time needed, as well as your perception of those tasks (if you like them or dislike them).

Why bother with tracking your time?

Over the years, as your business has grown, so too has your role as owner and operator. There are tasks and activities you once did that were vital in the early days, but which are no longer important for you. Do you know what they are?

Tracking your time for a week has several advantages:

- ✓ It brings clarity about how you're truly spending your time right now. This awareness may help you realize there are things you're doing which you no longer want to do, or which you thought took less time than they actually are.
- ✓ This will help you discover more clearly where your time is going and if you are actually doing the things that you want to be doing (or think you are doing) on a daily or weekly basis.
- ✓ This weekly time tracker will help you discover if you have enough margin in your schedule. Is there down time / empty space for you to do the most important things with focus and excellence?
- ✓ This will give you insight into what tasks and responsibilities need to be delegated.

In a week from now, you will have an honest snapshot of how you're truly spending your time! What an incredible and powerful (and possibly somewhat depressing) dataset.

You'll then continue on and use your time log, any other current commitments you have, and any ideal ways you'd like to be spending your time... and put together to form an ideal schedule.

How to use the Time Tracking Template

You can use the Template on the following pages or the software templates and other time-tracking tips are available as part of the online page for this lesson.

- Write the activity
- How much time did you spend on it?
- Is this an activity that you generally like doing or dislike doing?
- Is this something that only you can do or could someone else with training and resources do it?
- If this was a work activity, what TYPE of activity was it? Were you Doing a task, Deciding something, Delegating an outcome, or Designing the future?
- Bonus, check your screen time report for how much time you spent on social media, etc...

Activity	Time Spent	Like or Dislike?	You or Anyone?	Doing, Deciding, Delegating, or Designing?	Notes
Planning the week	45 min	Like	Me	Designing	
Workout	30 min	Like	Me	N/A	
All-Hand Meeting	2 hrs	Dislike	Me	Deciding	
Fixing a typo on the website	45 min	Dislike	Anyone	Doing	Find someone!
Researching for new product	3 hrs	Like	Me	Design	

Focusing on the Most Important (The Ownership Matrix)

Looking at your list of weekly activities and commitments from the time tracker, place as many of those activities as you can into the Ownership Matrix below.

I LOVE doing this		
I DISLIKE doing this		
	ANYBODY can do this for me	ONLY I can do this for myself

Notes

Now, consider your normal, current weekly schedule. You can also look at your list of activities and commitments from page ... With that in mind are you allowing time to focus and grow in each of the six areas of your life?

Are you currently allowing time to focus and grow in each area of your life?

My Role as Business Owner	Yes	No
My Hobbies and Side-Interests	Yes	No
Relationship with my spouse / significant other	Yes	No
Relationships with my kids	Yes	No
Relationships with my friends	Yes	No
Relationships with my family	Yes	No
My Inner Personal / Spiritual Life	Yes	No
My Emotional Health	Yes	No
My Mental Health	Yes	No
My Physical Health	Yes	No
My Rest Time, Down Time, and "Play" Time	Yes	No
My Finances	Yes	No

For any of the areas of your life and business that you are currently NOT giving regular time to focus and grow, why do you think that is?

Create Your Million Dollar Schedule

On the previous lessons and pages you have:

- Identified your Business Critical Actions (*Lesson 5*)
- Assessed your current schedule (*Lesson 6*)
- Listed your current areas of responsibility (*Lesson 1*)
- Come up with six preferred Lifestyle Practices (*Lesson 3*)
- Identified things you can automate, eliminate, or delegate (*p. 164*)

Taking all of that information, **use the schedule template on the following page(s) to fill out what your ideal weekly schedule could look like.**

Tips

- Create space for margin in your day and your week.
- Be sure to allow the time you need to do what is most important.
- Can you make time for your personal lifestyle habits?
- Do you have sacred time for you to focus on Designing your business and your Business Critical Action?
- Do you need to change your mind about what tasks and responsibilities are on your plate and which ones you finally need to delegate or remove altogether?

Remember

- **This is an *ideal* schedule.** It may not be realistic or feasible right now, and that's okay.
- **The Law of Tradeoffs** means you will not be able to do *everything*.
- **The Law of Attention** means you will get results from what you give energy to.

Fear not! Your schedule isn't meant to be set in cement. If you can keep 80% of your weekly schedule, then wow! That is an A+ grade. Your schedule is your weekly framework for how you best want to spend your time. It's for helping you make sure you've allocated time for giving consistent energy to the critical and meaningful things of your business, personal life, relationships, health, and etc.

MILLION-DOLLAR SCHEDULE

Wrap-up

Most Important

Drafted an updated schedule for myself

Bonus

Celebrated the completion Lesson 6

Something surprising, interesting, exciting, or otherwise noteworthy about my schedule...

Share your win with the Boss Board

Use the community Slack channel and the Boss Board live call to share the fact that you've drafted an updated schedule! This is HUGE!

FOCUS DECLARATION

Lesson 7

- ✓ Gather the elements and answers from your workbook answers.
- ✓ Fill out your Focus Declaration using the template provided.

Success for this section: Writing and sharing your Focus Declaration.

What is your Focus Declaration?

Your Focus Declaration is a one-page statement that brings together all the hard work you've done. This statement creates your clear and focused plan of action. It is a **summary of: (a) WHAT matters to you for your personal life and in your business; (b) WHY those things matter; and (c) WHAT you're going to do about it.**

The whole reason this program exists is to help you get clear and take action.

You have done the heavy lifting to get clear! But if you stop now, then all your work will be little more than meaningless information. It's time to take action. Remember the words of F.M. Alexander who said that *you cannot decide your future, but you can decide your habits. And your habits will decide your future.*

Using all the assessments and worksheets from the Focus Course (in Boss Mode), you can now simplify it into a single **Focus Declaration** that will help you know what to focus on next and how to take the action that will decide your future.

How to write your Focus Declaration

Here is the short list of what you will in order to summarize your work through this training and write your Focus Declaration. Use the following page to gather your work, and then you will put it all together into your one-page declaration using the done-for-you template on the last page.

1. Your two personal core values
2. The area of life that matters most to you right now
3. The goal you have for that area
4. The lifestyle habit you thought mattered most
5. The area of margin that mattered most
6. The two ideas for how to increase and decrease margin for the margin area that matters most to you right now
7. Your Business Core Focus
8. Your Business Critical Actions
9. The Business Goal that matters most
10. Your Ownership Matrix

Components of your Focus Declaration

What are your two core values? *(p. 38)*

↙ _____ and _____

Which area of margin did you identify as most important right now? *(p. 76)*

↙ _____

For the above area of margin, how can you restore it through increase and decrease? *(p. 52)*

↙ _____ and _____

Which area of life did you identify as most important to you right now? *(p. 112)*

↙ _____

For the above area of life, what do you want to do, be, or have someday? *(pg. 88 - 101)*

↙ _____

For the above area of life, what lifestyle habit stood out as most important right now? *(p. 112)*

↙ _____

What is your Business Core Focus? *(p. 130)*

↙ _____

Which business goal stands out as most important to you right now? *(p. 145)*

↙ _____

What is the business critical action that serves your business goal? *(pg. 154 - 155)*

↙ _____

What is something from the lower-left quadrant you can remove from your work life? *(p. 164)*

↙ _____

I Will Focus Like a Boss

Because I value _____ and _____ ,
VALUE 1 VALUE 2

I want to focus on my _____ and begin moving toward my desired
AREA OF LIFE
outcome of _____ .
SOMEDAY GOAL

Additionally, for my business, our core focus right now is _____
BUSINESS CORE FOCUS
_____. And I am excited to move toward our
desired outcome of _____ .
BUSINESS GOAL

I know that small, consistent steps result in big change. Thus, I will make time in my schedule
for _____ , and I will prioritize
LIFESTYLE HABIT
_____ as the most important action at work.
BUSINESS CRITICAL ACTION

To create time and protect focus, I will stop _____ . I
OWNERSHIP MATRIX ITEM
will also create margin in my _____ , by
AREA OF MARGIN
_____ and _____ .
MARGIN IDEA: "DECREASE" MARGIN IDEA: "INCREASE"

Signed

Dated