

WORKBOOK

Goal Setting
for
ENTREPRENEURS
and
COACHES

**DR. GENEVA
SPEAKS**

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INTRODUCTION: HOW TO SET AMBITIOUS GOALS YOU CAN ACTUALLY REACH

This workbook will walk you through setting goals to create the business and lifestyle you want.

The steps in this guide are designed to help you assess your business, strengthen its foundation, and set up a system that levels up your production and increases creativity to set up and implement bigger goals.

No matter what level of coaching you practice or how new or experienced you are as an entrepreneur, this workbook will help you.

If you are experienced, the strategies and exercises can help you identify areas to strengthen and act as a handy check and refresher. If you are brand new, they will help you increase your confidence while showing you ways to deal with mindset issues and increase your visibility and value.

Read through each step even if you've already dealt with or instituted some of the areas discussed in the workbook. You'll likely discover a tip or new insight to help define and refine your goals.

Once you've gone through each step and completed the corresponding worksheet, you'll be on your way to creating the income and lifestyle you love while getting paid what your work is worth.

Let me know how this has helped you and any other feedback.

Your Vibrant Life Coach,
Dr. Geneva

Let's get started!

STEP ONE: DETERMINING WHICH TOOLS YOU NEED

Setting goals is easier and more accurate when you use the right resources and tools.

Assessing How You Work

Creating a solid foundation doesn't rest on the tools you use, but taking time to assess your assets and needs helps make sure you have all the advantages.

- **Identify the number-one tool or resource you couldn't live without in your business.** This should be a specific app, tool, SaaS, or help, not just "an autoresponder" or "a shopping cart." Think about this, and write your answer down below:

My indispensable tool/resource is:

- Why?

- What does it allow you to do?

- **Complete the following statement:**

"I find it easy to work with

because it _____

- **Brainstorming.** Analyze your learning preferences. Determine what sparks the best brainstorming ideas when you work:

- In a group, discussing ideas
- Making drawings and diagrams
- Using colors to differentiate and separate
- Watching videos
- Recording ideas audibly
- Reading transcripts
- Writing down point-form or free-form ideas
- Just getting on with performing something – you’ve no time for research or analysis
- Building a model

If you work best in a group, discussing ideas; recording ideas verbally, or getting ideas while listening to a lecture or podcast – and especially if you shut your eyes or don’t look at the person speaking – your dominant learning preference is **audial**.

If you work best making or looking at drawings and diagrams and especially if you code by color, your dominant learning preference is **visual**.

If you work best writing down point-form notes or free-form ideas, and if you prefer transcripts to video, you are most likely an informational learner whose dominant learning preference is **textual**.

If you work best building models or just manually getting on with a project, your dominant learning preference is **kinesthetic**.

People are often a mix of learning styles but focus on your predominant one.

Here’s an important point to ponder in light of this exercise: Often, when people have problems with specific tools or resources, it’s not because they are technologically challenged but because they are using a tool geared towards those with a **different learning preference and style**.

It is essential to make sure you use the right tools – from the brainstorming stage all through your business operations and procedures.

1. Which tools, systems, apps, software or resources do you currently find stressful or difficult to utilize?
2. Do you absolutely need this system in your business?
3. Why? _____

Decide which strategy you will adopt to deal with this problem:

- ☐ Find a different tool or system
- ☐ Find a better tool that automates the parts you find difficult
- ☐ Outsource it to someone who specializes in handling it

If you need your business to use a specific tool outside your comfort zone, don't waste time trying to master it! **Find a specialist** with experience in its setup and operation, and **outsource** everything affected by this tool.

☐ **Planning**

At this point, you've identified your learning style and better understand what works for you in the way of tools. Analyze how you usually plan things, determining what works – what plans do you tend to act upon, set up, and follow through on? And what doesn't work for you too?

Another preference to factor in here: Are you an intuitive/creative ideas person, or do you need to plan everything out to the point where it eventually paralyzes you?

LEFT-BRAIN TRAITS	RIGHT-BRAIN TRAITS
<input type="checkbox"/> Linear thinking	<input type="checkbox"/> Abstract thinking
<input type="checkbox"/> Factual thinking	<input type="checkbox"/> Creativity
<input type="checkbox"/> Logic	<input type="checkbox"/> Intuition
<input type="checkbox"/> Sequencing	<input type="checkbox"/> Emotion
<input type="checkbox"/> Strong in mathematics	<input type="checkbox"/> Strong in the arts
<input type="checkbox"/> Mastering processes	<input type="checkbox"/> Innovation
<input type="checkbox"/> Analytic thinking	<input type="checkbox"/> Visualization
<input type="checkbox"/> Chronological process preference	<input type="checkbox"/> Daydreaming; imagination
	<input type="checkbox"/> Thinking outside the box

Most people are a mix of left-and-right-brain traits, but be aware that if you lean heavily one way more than the other, make sure you use methods and tools that favor the dominant hemisphere.

The best bet? If a tool or method isn't working, try another one that feels more intuitive or comfortable. Or outsource its use!

- **Structuring**

Determine where your attempts to structure product creation and other major business activities run into bottlenecks. Decide what you need to do about it:

- ☐ Change a tool or SaaS?
- ☐ Outsource this step?
- ☐ Eliminate a project or step altogether?

- **Creation**

When it comes to product or content creation, analyze your current projects.

Identify where you get bogged down.

Is it a problem with:

- ☐ Time?
- ☐ Organization?
- ☐ Knowledge or skills?
- ☐ Lack of regular habit creation?

Determine what you can do to correct gaps and glitches.

TIME	ORGANIZATION
What usually happens:	What usually happens:
What I can do about it:	What I can do about it:
KNOWLEDGE OR SKILLS	LACK OF REGULAR HABITS
What usually happens:	What usually happens:
What I can do about it:	What I can do about it:

- **Organization**

As with structure and product/content creation, a lack of implemented habits will be the biggest killer to organization.

Find the right tool(s), apps, or other resources to help create strong habits – outsource your business organization or hire a coach/work with a mentor.

Tools that generate reminders are always helpful when creating and sticking to a routine. So are accountability partners and groups.

Which approach will you take in getting your business organization routines back on track?

- ☐ Using apps or tools
- ☐ Outsourcing
- ☐ Working with a coach
- ☐ Working with a mentor
- ☐ Working with an accountability partner

Tools to consider:

<u>ActiveInbox</u>	Allows you to use Gmail as a task manager
<u>YouCanBook.me</u>	Online scheduling tool that you and team members can access and use. Clients can self-schedule too!
<u>Zendesk</u>	Use this simple, reliable Help Desk software to automate client care
<u>Asana</u>	For easy project management
<u>AwesomeNote 2.0</u>	Complete, colorful, user-friendly full organization system. Calendar, scheduler, organizer, and task list.
<u>30/30</u>	Time management app that breaks your day into 30-minute chunks. Highly intuitive and flexible.

- **Income Generation Tools**

What income generation tools are you using, and do they have robust features to boost your income and capture the right leads?

Check off the tools that you are using right now:

- ☐ Autoresponder
- ☐ Signup form and incentive
- ☐ Payment buttons
- ☐ PayPal buttons
- ☐ Shopping cart
- ☐ Help Desk
- ☐ Other _____

Strategies to adopt:

Determine how you are going to boost your income. By working smarter, not harder? By diversifying your offers?

- ☐ Increase the value and price of existing programs
- ☐ Add passive income products to use as OTOs, upsells and downsells
- ☐ Create at least one recurring monthly income product

Tools to consider:

<u>DiviBuilder</u>	Use this WordPress theme to rebrand and update your website PLUS easily create gorgeous lead pages and sales pages
<u>Zoom</u>	Use the free version to quickly create videos
<u>OBS Studio</u>	Essential software for Facebook Livestream creation
<u>ClickFunnels™</u>	Complete marketing and funnel creation system



Read Social Media Examiner's article, "[Live Video Tools: The Best Apps for Going Live.](#)"

- **Tracking**

Make sure you create a vigorous tracking routine, taking advantage of all native tracking and analytics capabilities in the systems and software you use. If you need to, **outsource** tracking and monitoring to a VA specializing in search and analytics.

- Set up your Google Analytics, if you haven't already done so
- Set up your Facebook Tracking Pixel

Template creation

Remember to **document each process you create**. Make a template if it is a process you'll be repeating.

Make a list of templates to create for your business. Add master copies to your SoP file or manual.

- **Style Guide** – branding images, colors, fonts, logos, buttons, icons
- **Recurring content** – reviews, blog post structure, emails, etc.
- **SoP manual**

MY TEMPLATES

Use this as a Master List for brainstorming templates you have created or need to create. Check off when the template has been made.

Templates
<input type="checkbox"/> Admin Templates
<input type="checkbox"/> Email Templates
<input type="checkbox"/> Client Templates
<input type="checkbox"/> CTA List
<input type="checkbox"/> Blog Post Templates
<input type="checkbox"/> Content Templates
<input type="checkbox"/> Sales Templates

MY GOAL-SETTING PLAN

In 12 months, I would like to add _____ to my business.

Doing this will help me generate \$_____ (or XX%) more income.

In _____ months I should be ready to hire a _____

In _____ months I should be ready to add _____

I will have accomplished:

- ☐ _____

- ☐ _____

- ☐ _____

CHECKLIST: USING TOOLS AND TEMPLATES TO ASSIST IN SETTING AND ACHIEVING GOALS

Complete this checklist to ensure that you are using the best tools, templates, and processes for your business

- ☐ I have figured out my predominant learning style and preferences
- ☐ I have reassessed the tools I use and adjusted by:
 - ☐ Discarding ones that don't work for me or outsourcing their use
 - ☐ Adding tools that are easier for me to use
 - ☐ Adding tools that will add to the perceived value of my business
- ☐ I have analyzed my planning process and tools and determined the following:
 - ☐ Where I get stuck
 - ☐ Which tools can help me move past those bottlenecks and blocks
- ☐ I have analyzed my goal-setting habits and techniques, as well as where I get stuck
- ☐ I have determined planning and organization habits I need to reinforce and create
- ☐ I have set in place automatic income generation through:
 - ☐ Creating passive income
 - ☐ Adding supplemental offers to my existing courses, products, and programs
 - ☐ Creating regular, recurring income
- ☐ I have created and am using a robust and regular tracking system
- ☐ I have documented processes and made templates from recurring ones
- ☐ I have determined whether or not I need to hire someone to sync and clean up my tools, systems, and apps

WORKSHEET: TOOL ANALYSIS

1. List your business tools:

Tools I own:

Tools I actually use!

Tools I need to stop using:

2. Determine which of your tools sync with other devices.

3. Set that in motion if you need to hire someone to clean up your apps, SaaS, and software.

☐ Done!

- Determine what tasks or activities you can let go of – by delegating, outsourcing, or discarding.

DELEGATE	OUTSOURCE	DISCARD

- Determine what can be automated and do it (or hire someone to do it):

AUTOMATE	WHO WILL DO THIS?
What: How:	
What: How:	
What: How:	

EXERCISE: SET YOUR GOALS

Re-evaluate your current goals and set any new ones you need to create.

- Are my current goals the ones that make me happy thinking about them, or are they driven by duty, necessity, or other people?

Goal #1: _____

Goal #2: _____

Goal #3: _____

2. What in my life would I love to let go?

3. What in my life do I desperately need more of?


4. What would truly make me happy on all levels is....

STEP TWO: EXPANDING YOUR INCOME

If you haven't already done so, reassess and re-calculate your income goals.

Resource: Use the [TimeFreedomBusiness free income/time calculator](#):

PUNCH YOUR NUMBERS INTO THE CALCULATOR NOW!



Enter your income goal for the year. Ex: 100000. (Do not use \$ or comma):	
Enter the number of weeks you want to work this year:	
Enter the number of days you want to work each week:	
Enter the number of hours you want to work each day:	
<div style="background-color: #002060; color: white; padding: 5px 15px; font-weight: bold; cursor: pointer;">CLICK TO CALCULATE</div>	

When you've done this, write down and record the following:

- Your income goal:

\$ _____ monthly
 \$ _____ in 12 months

- The maximum number of hours you want to work per week

- The maximum number of hours you need to work per week to generate your income goal by yourself

- How many team members do you want?

■ Immediately _____
 ■ In 12 months _____

- How many team members do you need to grow your business?

■ Which areas do you need to bolster or build up so that these areas of your business are functioning at maximum efficiency?

■ My visibility and community interaction

■ Lead generation

■ My email lists

■ Product creation

■ Promotion

■ Advertising

■ Tracking

■ Planning

■ Budget

■ Tools

■ _____

■ _____

■ _____

■ List specific team members you need to hire over the next 12 months.

Growing Your Business Machine

As you augment each area, record the details below. It's good confirmation that you are moving toward your goals!

MORE COACHES, INSTRUCTORS OR FRONT-LINE TEAM MEMBERS	MORE BEHIND-THE-SCENES TEAM MEMBERS

Record the increase in your pricing and income.

MY PRICES		
My time: \$ _____ per hr.	Increased to \$ _____ per hr.	Hours per week before: _____ Hours per week after: _____
Product/Program: Value added by: From \$ _____ To \$ _____	Product/Program: Value added by: From \$ _____ To \$ _____	Product/Program: Value added by: From \$ _____ To \$ _____
Product/Program: Value added by: From \$ _____ To \$ _____	Product/Program: Value added by: From \$ _____ To \$ _____	Product/Program: Value added by: From \$ _____ To \$ _____

WORKSHEET: MINDSET ADJUSTMENTS

Use this worksheet to help ensure you've done the necessary mindset work that allows you to believe in and enjoy your increased fee and product prices.

1. Are you experiencing any discomfort with the new prices and fees you want to set?

- ☐ Yes. I feel like a fraud.
 - ☐ Yes. I set them lower than I want to or need to.
 - ☐ No. I'm happy I'm finally charging what I'm worth!
2. If you selected either of the 'yes' answers, you would need to figure out where that mindset disconnect is coming from – and how you will do this.
- ☐ Time for a tune-up session with a mindset coach!
 - ☐ Thanks, I'll read a mindset book or take a course
 - ☐ I'll find a group that can help me get past this
 - ☐ I will figure it out myself and correct it
3. I've identified all the mindset issues I need to deal with
- ☐ Yes ☐ Not yet
4. Am I still doing anything to sabotage myself that I need to take care of?
-
5. Speaking of goals, what are my mindset goals?

CHECKLIST: RAISING PRICES AND ENHANCING VALUE

Use this checklist to ensure your prices and value are aligned after adjustments.

- ☐ I have added perceptible value to existing products by upgrading them
- ☐ I have rebranded my enhanced offer with high-end marketing
- ☐ I have raised my prices to be competitive with a higher-end market

- ☐ I am aware of what's hot in current program creation delivery vehicles:
 - ☐ Livestreams
 - ☐ Courses
 - ☐ Interactive boot camps
- ☐ I am constantly on the alert for more ways to monetize my business and my existing programs, products, and other offers
- ☐ I think like my customers when brainstorming new products and programs and anticipating potential objections
- ☐ I am actively seeking to put my unique twist on products and offers I create so that I stand out from my competitors
- ☐ I have determined:
 - ☐ Which formats are most comfortable for me
 - ☐ Which formats are preferred by my ideal audience
 - ☐ What implementing new offers and new delivery methods will cost
 - ☐ What implementing new offers and new delivery methods will mean in terms of time and learning curves
- ☐ When it comes to making changes and creating new offers or programs, I have figured out the following:
 - ☐ How I will execute each step
 - ☐ How long to allow for each step to be completed
 - ☐ What I need to invest in the upfront – buy, hire, or subscribe to

STEP THREE: PRODUCT PLANNING

Lay out the steps to move toward your up-leveling goals so that you'll know you're making progress as you complete each one.

1. Brainstorm and start the creation of a signature, high-end offer

Generate ideas

Do [keyword research](#)

Run ideas by your ideal audience

- ☐ Polls
- ☐ Surveys
- ☐ Questions
- ☐ Posts
- ☐ Tracking comments and responses
- ☐ Checking in other sources – marketplaces; are there existing courses, etc.?

Come up with a [hot, catchy title](#) or highly descriptive name:

Add upsells, downsells, and OTOs

Set price! \$ _____

2. Create a high-value sign-up incentive

3. Track everything!

This year, I will set up and launch a main offer [program/course/membership club] called _____ that will bring in \$_____ per [client/member] and increase my annual income by _____ %.

I'll know when I've successfully accomplished that when I have:

1. _____
2. _____
3. _____

My main offer will have additional monetization in the form of:

Add-on: _____

Upsell: _____

Downsell: _____

OTO: _____

This gives the potential to increase my income by a further \$_____ or _____ %.

STEP FOUR: LIVING YOUR BEST LIFE

Time for a little more mindset work! If you are still 'stuck' in any areas of your life, take care of them now. When one is blocked, and you can't figure out why it helps to look for attitudes and beliefs you never even question: Ones you have always taken for granted. Ten to one, these beliefs and attitudes keep you shackled to old patterns and mindsets.

When you understand that fear makes people refuse to move forward, it becomes easier to let go. Fear can be your friend sometimes – it can stop you from jumping off a 500-ft. high cliff – but when it prevents you from achieving your heart's desire, time to loosen its grip!

1. Identify the most problematic, fear-based mindset thought(s) you are clinging onto.

2. Identify the pay-off it is giving you. (Example: Deciding not to do something you need to do means you are not taking any risks.)

3. What is the worst that could happen if you ignore the fear by adopting a new mindset?

4. What is the best that could happen if you ignore the fear and adopt a new mindset?

5. What are you going to do to eliminate this leftover, stubborn belief?

☐ Realize that feelings are just feelings and do things differently anyway

☐ Start by taking a small step

☐ See a mindset counselor

☐ Other _____

Set a goal and a deadline for dealing with this issue:

By ____/____/____ I plan to _____

And get rid of _____

I will initiate action today by taking this specific step:

I will replace my old negative belief with the following reframed affirmation or thought:

Perfectionism:

Decide whether or not you don't outsource because doing things yourself is a compulsion. If so, you likely have perfectionist traits.

Realize that your best defense against others not setting up things or doing things as you need them to do them is to set up a transparent Systems and Procedures Manual (SoP), documenting every recurring task. Having assistants follow your SoP documentation and procedures will eliminate room for errors or misinterpretations.

Plus, providing team members with templates will ensure they create products and content, and perform tasks, precisely the way you want them to.

Perfectionism is not a virtue: It loses you money, eats up your time, and burns you out. When you realize that replacing perfectionism and micro-managing with simply setting standards for quality control and consistency, it will become easier to lose perfectionist habits.

Financial fears/constraints:

These can be very valid, especially if you have a tremendous debt load or are just starting. However, remember to apply creative thinking if you have decided to invest in something that will cost serious cash.

To secure a loan, you will need to present a sound business plan to potential investors (use a template/wizard that helps you prepare a business plan for investors.) If you need help with this, take out an inexpensive subscription to [LivePlan](#) – you can select a business plan template for investors, and LivePlan will walk you through the process using its easy wizard structure.



Then be creative. If you can't get a loan through a bank, look for other sources of funding:

- <https://www.sba.gov/funding-programs/loans> (USA)
- <http://www.ic.gc.ca/eic/site/csbfp-pfpec.nsf/eng/Home> (Canada)
- [Fundera](#) (Small Business Loans for Women)

WORKBOOK: Goal Setting for Entrepreneurs and Coaches

The screenshot shows the Fundera website interface. At the top, there's a navigation bar with links: How It Works, Loans, Credit Cards, Banking, and More Resources. On the right, there are buttons for 'Log In' and 'Get Started'. The main content area has a blue header with the text 'The Best Small Business Loans for Women in 2018' and 'Find 37 Financing Options and Resources for Women-Owned Businesses'. Below this, there's a form for 'Desired Loan Amount' with a text input field and a 'Continue' button. A link 'Already have an account? Log In.' is also present. On the left side, there's a sidebar with a table of contents: Overview, Types of Loans, Types of Business Grants, The Top Resources, and The Bottom Line. The main content area below the header is titled 'Finding the Best Small Business Loans for Women' and includes a paragraph about women entrepreneurs starting and growing businesses in the US.

- [KIVA](#) (If eligible, you can borrow up to \$10,000 at 0% interest plus take advantage of 'free marketing and new customers')

NOTE: Don't borrow money without seeking professional financial advice on the feasibility and advisability.

If you don't want or need to borrow or invest large sums now, start outsourcing on a shoestring. Start following and reading outsourcing articles on the [TimeFreedomBusiness blog](#), written by outsourcing authority Melissa Ingold – and check out her article, you [How to Outsource on Fiverr—Even if You Don't Think You're Ready](#).

I will begin outsourcing on ____/____/____. I will start by hiring a _____
_____ to _____.

This will free up _____ hours of time for me per month/week, which I will put to use on _____.

In 12 months, I would like to add _____ more contractors to _____
_____ and _____.

EXERCISE: YOUR TIME, VALUE, AND FREEDOM

Refresh your memory on what creating more personal time can do for you... and your business!

FOR YOUR BUSINESS	FOR YOUR HEALTH
<ul style="list-style-type: none"> <input type="checkbox"/> Allows you to schedule blocks of time for creativity and processing <input type="checkbox"/> Allows you to schedule time for your own personal and professional growth (coaching, taking courses, updating credentials, exploring new trends, etc.) <input type="checkbox"/> Allows you to explore new business ideas and options thoroughly enough to implement them 	<ul style="list-style-type: none"> <input type="checkbox"/> Helps you to de-stress <input type="checkbox"/> Improves sleep patterns <input type="checkbox"/> Allows time to exercise <input type="checkbox"/> Provides time for relaxation and social interaction <input type="checkbox"/> Gives you time for eating properly <input type="checkbox"/> Creates time for self-care, hobbies, family life, and socialization

As you free up time in your business through automation and outsourcing, allow yourself to use it as **personal time**.

Decide:

- How many hours are you going to free up and re-assign to personal time immediately:
_____ hours per week
- How many hours do you want to increase that to by the end of 12 months:
_____ hours per week
- How many hours per week do you want to work by year's end regularly:
_____ hours per week

Start investing in yourself:

1. Do something for yourself that you wouldn't usually do. (Write this down here, and check it off when you've done it!)

I plan to:

☐ **DONE!**

2. De-clutter at least one room in your house. Make it over into the sort of room you only dream about.

☐ **DONE!**

3. Buy one expensive item you've always wanted.

I plan to buy:

☐ **DONE!**

EXERCISE: REALIZING YOU DESERVE YOUR DREAMS

Take the time to answer the following questions. Getting your motivations clear is a vital step in realizing you deserve your dreams.

1. What can I do for myself that I wouldn't usually let myself do?

2. What will that make me feel like?

3. Why is it important to me?

4. Which room should I start with if I'm going to de-clutter?

5. What will that free that particular space up for?

6. How can I use it to move me forward emotionally, spiritually, or in other ways?

7. What one luxury purchase could I buy that would also move me forward emotionally, spiritually, or in other ways?

8. Why would it have that effect?

9. Why is it so important to me? What does it represent?

10. Why have I denied myself for so long?

Take some time to dream now. Decide what you want in life and **be specific**.

Your Dream House	Type of house, location, climate
Working life	Hours you work, where you work, when you retire, where you invest your energy

Hobbies	Things you've always wanted to do that you will have time for
People	Who do you want to spend more time with?

CHECKLIST: TICKING OFF THE BOXES

- ☐ I have confronted or identified:
 - ☐ Old stories and assumptions I took for granted and never questioned
 - ☐ Blocks such as perfectionism, fear, et cetera
 - ☐ The false 'payoff' fear-based behaviors and assumptions gave me
 - ☐ What I want to replace these thoughts with
 - ☐ The action(s) I can take to create better beliefs and attitudes
 - ☐ The amount of personal time I need to make in my life
- ☐ I have set the goals I need for:
 - ☐ Work hours
 - ☐ Personal time
 - ☐ Lifestyle
- ☐ I have completed all the previous exercises

STEP FIVE: MAKING THE WORLD A BETTER PLACE

It's now official. Studies have been done proving that spending on others is good for your blood pressure, good for your mood, and generally good for your health!

Make the world a better place by donating (think 'sharing') your money, time, skills, resources – or all of the above!

Think about the following ways to support your community and choose at least one activity that resonates with you.

- ☐ Volunteering at a shelter
- ☐ Joining a Neighborhood Watch organization
- ☐ Taking on a section of highway to regularly clear garbage from
- ☐ Volunteering with an organization such as Red Cross or St. John Ambulance
- ☐ Volunteering at your local hospital
- ☐ Joining a local group to better your community through activities such as planting community gardens
- ☐ Volunteering at your local food bank
- ☐ Volunteer through your church or religious institution
- ☐ Giving your time for free to local business organizations by putting on workshops, mentoring, organizing or setting up local events, et cetera
- ☐ Volunteering with Meals on Wheels or a similar program
- ☐ Volunteering to drive seniors or clear their snow, and so forth
- ☐ Coaching a youth organization such as Boy Scouts, a local sports team, et cetera

Donating money:

If you experience anxiety around donating money, realize it's perfectly okay to start with small amounts. If you're afraid organizations or charities are not legitimate or will waste your money, check them out first and look at their status, reviews, and annual reports.

- ☐ Check out US charities at [Charity Navigator](#).
- ☐ For Canadian charities, visit [Charity Intelligence](#).

Resource: "[Happy Money: The Science of Happier Spending.](#)"

EXERCISE: SET YOUR HAPPY DONATION RATE

When planning your income growth for the coming year, factor in what you want to give and receive.

1. Decide what percentage you are comfortable donating once you attain your financial goal.

_____ %

\$_____ PER MONTH

2. Determine how much you are comfortable giving right now.

_____ %

\$_____ PER MONTH

3. How much can I afford to donate monthly?

_____ %

\$_____ PER MONTH

4. Is this a comfortable amount for me?

☐ Yes

☐ No

5. Am I better to donate one-time only sums occasionally when I meet specific income generation goals?

☐ Yes

☐ No

6. What type of charity or non-profit stirs my heartstrings or aligns with my core beliefs?

One that helps...

MY COMMITMENT TO GIVING:

Right now, I currently give to others from:

- ☐ My time
- ☐ My experience
- ☐ My money

In 12 months, my giving patterns will have changed in that I intend to:

1. _____
2. _____
3. _____

I am planning additional ways to give to others by immediately initiating the following:

- ☐ _____

I will know I am making a difference to the world/to my community when:

_____.

I am joyfully ready to accept responsibility for:

- ☐ My choices
- ☐ My decisions
- ☐ My actions
- ☐ My failures – and my success!