

QUICK PLAN BIG IMPACT



- **Get clear**
- **Get focused**
- **Make it happen**

Here's your simple guide to planning for a better year - and you can do it in 30 minutes or less!

1

REFLECT ON LAST YEAR...

- THE GOOD
- THE BAD
- THE TRUTH

WHAT MADE YOU PROUD?

WINS, PROGRESS, OR BREAKTHROUGHS.

WHAT CAUSED FRUSTRATION?

ROADBLOCKS, TIME-WASTERS, OR MISSED OPPORTUNITIES.

WHAT DID YOU LEARN?

ABOUT YOUR BUSINESS, YOUR TEAM, OR YOURSELF.

- **Get clear**
- **Get focused**
- **Make it happen**

From reflecting on last year, what do you want to continue doing, stop doing or start doing?

2

SET YOUR DIRECTION

- MORE
- LESS
- GET RID OF

MORE: STRONGER CLIENT RELATIONSHIPS, TEAM WINS, OR EFFICIENT PROCESSES.

LESS: WASTED TIME, REWORK, OR DRAINING TASKS.

GET RID OF: INEFFICIENT MEETINGS, CHASING LOW-VALUE WORK.

- **Get clear**
- **Get focused**
- **Make it happen**

Choose the area that will make the biggest impact for you and your business. Break it down

3

PICK **ONE** FOCUS AREA

- PEOPLE
- PROCESS
- PRODUCTIVITY
- POSITIONING

- **PEOPLE:** EG. BOOST MORALE WITH MONTHLY ONE-ON-ONES
- **PROCESS:** EG: CUT QUOTING TIME WITH QUICK TEMPLATES
- **PRODUCTIVITY:** EG: BLOCK 90 MINUTES DAILY FOR FOCUSED WORK
- **POSITIONING:** EG: BUILD VISIBILITY WITH A MONTHLY CUSTOMER CASE STUDY

- **Get clear**
- **Get focused**
- **Make it happen**

Make it happen - set a goal and create a habit

4

SET A GOAL

- FOR THE YEAR
- FOR THIS QUARTER
- FOR THIS MONTH
- FOR THIS WEEK

- **QUARTERLY GOAL:** WHAT'S THE BIG OUTCOME TO HIT IN 90 DAYS?
- **MONTHLY ACTIONS:** BREAK IT INTO 2-4 KEY MOVES.
- **WEEKLY TASKS:** SET ONE CLEAR STEP FOR EACH WEEK.
- **DAILY HABITS:** BUILD MOMENTUM WITH SMALL, REPEATABLE ACTIONS.

Make it real - write it down, lock it in!

Grab your diary or planner and commit to your plan

Q	THIS QUARTER'S GOAL	
M	MONTHLY FOCUS	
W	WEEKLY TASKS	
D	DAILY HABITS	



Our Team



Beth Park

Owner & Director

Specialist in business strategy, workflow system implementation and continuous improvement. Principal contact for all your support.



Michelle Ackroyd

Compliance Specialist

Expertise in H&S, quality and manufacturing compliance, systems documentation, office management and e-commerce.



Michelle Marshall

HR Specialist

Operational expertise in recruitment, onboarding, leadership development, training, change management, remuneration and employment law

Our Onsite Insight team have come from successful corporate careers but we have also all owned our own businesses as well.

We have first-hand experience of what it's like to be a business owner – warts and all – and we understand how you may be feeling, what you might need and how we can help.

We provide down-to-earth support and simple, practical systems that are tailored specifically for small and medium business success.