

# Weekly CEO Sanity Meeting: The Key to Optimizing Your Workflow

Hi CEO,

Welcome back to Section 5 of this free training!

This 'habit' that I'm going to share with you is less about a new ideas but more about implementation – actually getting sh\*t done.

This new habit will give you the accountability to get finished what you started!

You can do this!!!



## DAY 5 Weekly CEO Sanity Meeting: The Key to Optimizing Your Workflow

As entrepreneurs, we tend to be action-oriented individuals! We get big ideas and dive right in without too much time thinking about it.

But when we don't take time to plan and track our progress, we end up working harder than required – hello burnout!

According to Brian Tracy, every minute you spend planning saves you 10 minutes of spinning your wheels trying to figure things out as you go.

## This is why you need your WEEKLY CEO SANITY MEETING – a minimum of one hour will save you 10 hours in implementation.

Your CEO Meeting is not only the time to make sure you're on track with your business goals, but also make sure these goals are still in alignment with you and your desired lifestyle.

If I realize a business goal isn't helping me experience the ease and freedom (my 2 desired feelings) and is actually taking me away from my family or self-care time, it's time to realign myself to my priorities.

And if you realize you're off track with a major business goal, such as your monthly revenue goal, you can quickly adapt and adjust your plan to get back on track?

#### **WEEKLY CEO SANITY MEETING Checklist**

#### **1. REVIEW YOUR METRICS**

When I'm talking to business owners about tracking metrics, most of them think REVENUE. But revenue is what is known as a 'lagging' metrics – meaning it's the result of a series of other actions that have taken place. If you are only tracking revenue, then you're missing opportunities to improve your marketing and sales... meaning you're leaving money on the table.

We also need to track 'leading' metrics. These are numbers that will help you track the success of your marketing strategy and will be related to lead generation.

#### 2. REVIEW YOUR MONTHLY REVENUE GOALS

Check in on your revenue month-to-date and year-to-date. Are you on track with your revenue and NEW client goals?

#### **3. REVIEW YOUR MONTHLY ENGAGE GOALS**

This is an opportunity to check in on your lead generation – this could be new email subscribers, requests for proposals, consults, referrals, etc.) Are you on track with the number of potential clients (prospects) coming into your business?

#### 4. SET YOUR WEEKLY TOP 3

What are your top 3 priorities this week for your business? Put these front and center in your planner and/or block off time in your agenda to complete them.

#### 5. HOW ARE YOU ATTRACTING NEW CLIENTS?

Do you need to set up a new advertisement?Pitch yourself for a guest blog post? Pitch yourself for a podcast interview, a speaking engagement? Make time to take this action – your business needs new prospects.

#### 6. HOW ARE YOU ENGAGING NEW CLIENTS?

Do you have a free guide or training to encourage people to join your email list? Make the time to take action.

#### 7. HOW ARE YOU CULTIVATING NEW CLIENTS?

Do you need to write a newsletter? Show up on social media? Take time to take action.

#### 8. HOW ARE YOU INVITING NEW CLIENTS?

Do you need to book some sales calls? Send out some sales emails? Host a webinar or challenge? Make time to take action.

#### 9. HOW ARE YOU WOWING NEW CLIENTS?

Are you sending out thank you notes? Creating an extra special bonus? Make time in your calendar.

#### **10. MANAGE YOUR WEEKLY CALENDAR**

If it matters – make TIME for it. I use my Model Agenda to help me block time for recurring tasks or projects that take dedicated time.

#### **11. WHAT SELF-CARE DO YOU NEED THIS WEEK?**

You can't pour from an empty cup! What do you need this week to take care of yourself, rest, rejuvenate, and re-energize?

#### **12. WHAT SUPPORT DO YOU NEED THIS WEEK?**

Who can help you out this week? Where can you delegate tasks, ask for addition help or take the pressure off you?

#### **13. ADD TO PROJECT MANAGEMENT SYSTEM**

Update your project management system or CRM with any new tasks, delete old ones, set deadlines and delegate to your team.

#### **14. HOST YOUR TEAM MEETING**

Communication is key to any team that works well together.Each week, check in with your KEY team members to make sure everyone is on the same page and answer any questions or concerns. This meeting will dramatically cut down on meetings, emails and calls during the week.

### NOTES

