

Dear Reader,

Do you feel that you've stalled on the road to success? Are you working for work's sake, without a clear vision of your goals? Do you need to take a moment for reflection on your current level of personal and professional satisfaction?

The **Planning for Financial Prosperity** worksheets guide you through the process of

- 1) identifying behaviors that may be holding you back from greater success,
- 2) devising concrete, strategic steps to improve your prosperity, and
- 3) introducing a simple mechanism that will hold you accountable to your commitment for a more prosperous future.

Once completed, I invite you to forward these to my assistant, Cindy Pokoj at cindy@avisionofyourown.com to arrange a free 20-minute phone session with me. During this session, you and I will review your worksheets and create a strategy to help you move quickly and easily toward greater prosperity.

This 20-minute call is complimentary and comes with no obligation. I guarantee that it will be insightful and actionable, and you'll find yourself anticipating financial prosperity faster than you ever thought possible on your own.

I'm looking forward to speaking with you!

To your success and happiness,



Helen Dutton, Business Coach
A Vision Of Your Own



Step 1: Assess Your Current Situation

To know where you need to go, you need to know where you're starting from. Complete the following worksheet which addresses both personal and business financial situations to determine where you are on the path to managing your profitability.

I am not sure why I am in my business.	1	2	3	4	5	My personal goals relating to my business are clear.
My actions are based on my competitors and the current market.	1	2	3	4	5	I have a written plan on how I'm going to reach my goals. It can be adjusted easily based on current conditions.
Results will be what they are - no sense trying to guess ahead of time.	1	2	3	4	5	Conservative budgets are prepared annually and compared to actual results regularly.
Meaningful financial information seems to be too little, too late.	1	2	3	4	5	I have adequate financial information that allows me to know where my business stands at a glance.
I rely solely on myself for the answers.	1	2	3	4	5	I have a reliable and responsive business support team.
Activities are driven by revenue generation.	1	2	3	4	5	Activities are driven by profit generation.
Revenue needs to stay at high level to cover overhead.	1	2	3	4	5	Overhead expenses are kept very low.
Loan payments are sometimes paid by credit card.	1	2	3	4	5	All loan payments are paid on time without juggling cash.
I regularly use credit cards for purchases even though I don't have enough money in the bank.	1	2	3	4	5	All credit card purchases are paid at the end of each month.
I have purchases still in original packaging; staff has idle time.	1	2	3	4	5	Staff and belongings are used 80% of the time.
Company has not been profitable for some time.	1	2	3	4	5	Company's profit is at top of industry average.
I make all decisions.	1	2	3	4	5	Staff is encouraged to make decisions on own in line with company mission.
I have not taken vacation for over a year.	1	2	3	4	5	I have taken two or more weeks in the past year for a restful, relaxing vacation.
My business takes too much time for me to enjoy outside activities.	1	2	3	4	5	I have interests, hobbies and friends outside of my business.



Step 2: Establish Actions to Improve Your Profitability

The first step has brought to light some of the areas that you need to focus on to improve your plan for financial prosperity. The next step is determining which steps you'll take to achieve your success, and setting a realistic completion date.

Example: If you determined "Loan payments are sometimes paid with credit card", your action step may be "Setting up a line of credit for emergency cash reserves" or "Negotiating longer terms with loan holders" before the end of this fiscal quarter.

Action Steps to Which I'm Committing	Completion Date
1)	
2)	
3)	
4)	
5)	

Step 3: Define Your Accountability

This last step is critical to your success. Define one person in your personal or business life with whom you are comfortable sharing your results from Step 1 and who will support you in your Action Steps from Step 2. This person may be your partner, or a trusted business advisor who understands the challenges you're facing.

Have this partner commit to following up with you at a set date and time to hold you accountable for the completion dates set by your Action Steps.

Partner Name
Phone Number
Call Date/Time

About The Author

Helen Dutton is a veteran Business Coach and Owner of A Vision Of Your Own LLC. For over 10 years, she has coached CEOs and Business Owners to achieve business excellence with the mission "Achieving Excellence with Ease". Helen can be reached directly at helen@avisionofyourown.com or 603-529-2345.

