

So, we've advised you to take yourself on a Business Retreat to figure out your goals, your dreams, and your strategy for getting what you want. But what now? Here are some pointers to help you make the most of the time.

You can read more about Monica's approach to the process here:
<http://www.creativeplusbusiness.com/running-away-from-home/>

Where to go?

- Choose a place where you don't know anyone, that's far enough away so you won't be tempted to go home and/or bail out of the process.
- You need wifi, and a desk or table.
- Find a place where you will have enough room to write, draw, dream, walk and think.
- If you can afford it, pay for the accommodation – it will make you more likely to take the process seriously if you have paid money for the privilege.
- You will need a minimum of two days to make the most of the trip.

What to take?

- Comfy clothes, shoes for nice walks.
- Sketch books, butcher's paper, coloured markers, post-its.
- Your laptop.

Tips for the Process

- Allow for plenty of breaks, walks and naps during this process. Take or buy yummy things to eat as well. This process is not deigned to be a punishment!
- Don't push yourself too hard – if you need to stop, that's OK.
- Once you get into the swing of things, though, also remember to eat and sleep.

Phase One – Starting Out

- Step 1 - Prepare for some procrastination. You will become panicky, that's normal. Allow yourself 1 hour of mucking around, but no longer (This is the "detox" part). For more info, visit <http://www.creativeplusbusiness.com/procrastination/>
- Step 2 - Perfect Day. Complete the "Perfect Day" exercise (on page 3). It will help you to identify your long term goals.
- Step 3 - Brain Dump. Take everything inside your brain and get it out. What do you want from your life? Where are you going with your business? What about your creative life? Write it all on huge pieces of paper that you have stuck around the room.
- Step 4 – Brain Storm. Take everything you've written and write more. Draw pictures and dream and think of all the things you can.
- Step 5 – Organise the Dump. Start categorising the thoughts and scribbles into areas of your life – creative, personal, family, friends, business, finances etc.

Phase 2 –Goal Setting

- Step 1 – Short-Term Goals. Complete the questionnaire on page 5 to help you define your short term goals, while keeping your long-term goals in your mind. What could you be doing now to make the thing you want for the future happen? Finish as many questionnaires as you need to.
- Step 2 – The Big Hairy Audacious Goal. Have you thought about a long term vision of success for you and your creative business? Check out Page 8 to think more about your very long-term, very crazy big vision for your life.
- Step 3 – The Goal Matrix. See the WorkSheet on Page 6 for this activity, but you can also make your own. Write the names of the next 6-12 months across the top of a big piece of paper, and the categories you've created on the left hand side. Write down your short-term goals as created above, and when you want them to be completed. This creates a broad monthly schedule. Include steps towards your BHAG (page 6) if you like.
- Step 4 – Week by Week. Make a weekly matrix that give you one or two key things to do each week for each category to help you achieve your short-term goals.
- Step 5 – Put those key dates and deadlines into your calendar or diary, as well as the time you will need to set aside to make these goal a reality. You can support this through the Monday Morning Meeting on Page 10.

Phase 3 – Planning

For the very keen...

- Step 1 – Business Plan. Start creating, or updating, your business plan. You can find examples below.
- Step 2 – Marketing Plan. Start creating, or updating, your marketing plan. You can find examples below.
- Step 3 – Project Plan. Start creating, or updating, your creative project management plan. You can find examples below.

Resources

<http://www.creativeplusbusiness.com/running-away-from-home/>

<http://www.creativeplusbusiness.com/freestuff/#BusinessPlan>

<http://www.businessmodelgeneration.com/canvas/bmc>

<http://www.creativeplusbusiness.com/freestuff/#MarketingPlan>

<http://www.blacksburgbelle.com/marketing-for-creatives-a-digital-guide/>

<http://www.creativeplusbusiness.com/freestuff/#ShipltJournal>

<http://www.creativeboom.com/tips/how-to-manage-and-deliver-a-successful-creative-project/>

<http://www.aha4creative.com/creativeplanning.pdf>

Hopefully you'll find this process rewarding. Taking deliberate time, and paying for travel and accommodation, is very motivating and will help you to use your time effectively and come away with solid goals and action plans.

Defining what you want is one of the hardest things about being self-employed *and* one of the hardest things about being creative - its also one of the hardest things about being a grown-up. Goal setting and creative visualisation are both fantastically useful tools to help guide you on the path to the life you want, but you need to have a starting point. One example of that starting point can be a vision or a dream of a day in your perfect life.

Step 1: Block out some time.

Get a pen and some paper, shut the door, put your phone on silent and ensure that you will be uninterrupted for at least one hour.

Step 2: Prepare to Daydream

Sit in a chair, take a few deep breaths and close your eyes. Imagine what your Perfect Day would look like from the minute you wake up in the morning to the minute you go to bed. If you're struggling, ask yourself these questions:

- Where are you living?
- What does your home look like?
- What time in the morning are you waking up?
- Who is lying next to you?
- What are you eating for breakfast?
- How do you spend your morning?
- Do you work out? What kind of sports or hobbies do you enjoy doing?
- Do you have children? How old are they? What do they look like?
- What kind of food do you like to eat for lunch? Who is sitting at the table with you?
- What kinds of people do you call your friends?
- What kind of conversations do you have with them?
- What kind of work do you do? How successful is your business?
- What time do you start work?
- How many hours do you work each day or week?
- Do you sell products or services – or both? What does this look like?
- What are your clients like? How much are they paying you?
- What's your relationship like with your partner or spouse and your family?
- How do you spend family time together?
- What do you eat for dinner? Where do you have dinner?
- What do you talk about at dinner? Who else is there?
- What kind of clothes are you wearing?
- How do you spend your evening?
- Who do you spend your time with?
- What are your last thoughts before you fall asleep?

Step 3: Don't Think, Just Write

Once you have the beginning of the picture in your head, just start writing (and/or drawing, if you prefer). Use as much detail as you possibly can. While you're writing, try not to edit, critique or judge. This process is called *free writing*, and is used by authors to help them unblock. It involves writing continuously for a set period of time without worrying about spelling, grammar, or topic.

The results will be raw and messy, certainly nothing shareable, but it will give you a clear and truthful vision of your Perfect Day as a draft, and will help you to collect together your initial thoughts and ideas.

Step 4: Finesse

Once you've finished the free writing process, edit and hone your vision to create a step-by-step short story about your Perfect Day. This will help you to focus on what you want more effectively and give you something to work towards.

If you're still struggling, try these tips:

1. Use all your senses.

Are you too far away from the idea of your Perfect Day? If so, think about writing with all your senses in mind. What does your Perfect Day smell like? Taste like? Sound like? What does your body feel like? What are your emotions? Be really specific and write about the types of food you'd eat and the colour of your sheets. The more specific your writing is, the more real it seems, and the more likely you are to be able to get there

2. Write in the present tense.

When you write about your Perfect Day, use the present tense rather than the future tense. For example - "I wake up in my own bed, in my favourite freshly-laundered green sheets." Instead of "I will wake up"... By changing from future to present tense, the writing activity takes on a new power. If you write about it as if your life is already perfect, *you might be surprised at how empowering and possible this day is.*

3. Instead of focusing on *experiencing*, emphasise *doing*.

By focusing on your own actions inside your Perfect Day visualisation, you give yourself a game plan for what you can do to move your life forward. *Don't imagine your Perfect Day happening to you, but rather, visualise making it happen.*

The Perfect Day exercise is a process of **creative visualisation**, and incredibly powerful mind tool used by many successful professionals (including our Doyenne, Monica). For more information about creative visualisation, read these:

<http://www.creativevisualization.com>

<http://www.shaktigawain.com/products/books/creative-visualization>

And for more tips, try reading:

<http://chrisguillebeau.com/lifestyle-design-and-your-ideal-world/>

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Think about what you'd really like to achieve in terms of **your creative business in the next 6 months-12 months**. If it helps, visualise your next birthday or other significant date, and have a look around at your life – if you could realistically have whatever you wanted in the next year, what would your life look like in the near future?

- Maybe you have a financial goal (*to be earning x amount in 12 months time?*), a business goal (*I want to create a marketing plan by the end of this month*), a creative or artistic goal (*I need to finish that play by next year*), or a combination of all three!
- Set your goal based on what you have control over - Is your success dependent on other people? How are you going to define your own fate?
- Make sure your goal is specific, measurable by time, realistic and positive.

My one main goal in terms of my creative business is:

Thinking backwards from the end, what smaller milestones need to be accomplished to achieve that larger goal? Make as many steps as you need.

In terms of time, I want to make this goal a reality... when? Be as specific as you can.

Things that could get in my way are...

Things I can do to start solving those problems before they happen ...

How will I get in my own way?

For more info read: <http://www.creativeplusbusiness.com/map-making-beginners/>

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Creating goals is one thing, but making them a reality is another. A practical and creative way of mapping goals is to create a goal matrix.

Step 1: Using the **Goal Setting Worksheet**, and come up with one business/financial goal, one creative goal, and one personal goal.

For example – I need to find a new client, I want to finish the first draft of my book, and I need to plan my family holiday.

Create categories for your projects and mark them along the left hand side of a piece of paper.

Step 2: Work out your time frame. We recommend between 12 weeks and 6 months. Now draw up a table with columns across the top for your time frame.

Step 3: When would you like or need things to happen by? Set some realistic deadlines and mark them on the matrix.

Example: We've plotted the goals above in our matrix on the left, and used a time frame of 10 weeks.

GOAL	WK 1	WK 2	WK 3	WK 4	WK 5	WK 6	WK 7	WK 8	WK 9	WK 10
Client								Secure client		
Draft									Have draft finished	
Holiday										Be in Bali

Step 4: Put into the matrix all the deadlines and dates over which you have no control. For example, funding deadlines, work that must be completed, school holidays, whatever falls outside your ability to influence.

Step 5: Now, plan out what you can realistically achieve in each week or month, given your time constraints, the things outside your control, and your ultimate goals.

See over the page for our example.

Example: Here's the 10 week goal matrix, with some more details added. Be as specific as you can about the activities that you will undertake in each week, and the results that you hope to achieve as a result.

GOAL	WK 1	WK 2	WK 3	WK 4	WK 5	WK 6	WK 7	WK 8	WK 9	WK 10
Client	Update website	Research 1 client	Email that client	Follow Up Call	Schedule Meeting	Have meeting	Final brief / follow up	Secure client		
Draft	Finish Chapter 1 1000 wds	Finish Chapter 2 1000 wds	Finish Chapter 3 1000 wds	Finish Chapter 4 1000 wds	Finish Chapter 5 1000 wds	Give 5000 words to editor	Make notes	Oops – not going to happen!!	Finish Draft??	
Holiday	Research destination + hotels	Book Tickets + Hotels	Check passport - up to date?	Think of activities on Bali	Start to pay off credit card	Get travel insurance	Need new luggage? Download translation app.			Be in Bali

Step 6: Hold yourself accountable to the matrix! Revisit the matrix every week to see how you're getting along, and measure your journey as you go. If things happen beyond your control, or if you slip behind, just adapt your matrix to suit the reality of your situation!

And if you can, include some of your BIG HAIRY AUDACIOUS GOALS in there as well (see over).

For more instructions on how to set, meet and manage your goals, please read [Map Making for Beginners](#) on the Creative Plus Business website.

A note – the Goal Matrix is very similar to a GANTT chart, which some of you may already know as a project or stage management tool. You can find out more here:

<http://www.gantt.com>

<https://www.officetimeline.com/gantt-chart-excel>

<https://www.smartsheet.com/blog/gantt-chart-excel>

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Jim Collins and Jerry Porras first coined the term BHAG (Big Hairy Audacious Goal) in their 1994 book entitled ***Built to Last: Successful Habits of Visionary Companies***. They describe a visionary BHAG as a 10-20 year compelling goal that stretches your company to achieve greatness. It should be a huge, daunting task, like climbing Mount Everest, which at first glance no-one knows how on earth you will achieve – not even you.

Your BHAG should have the “gulp factor”... meaning that when people hear it for the first time, they must swallow hard to take it all in. But there is magic in the gulp factor, magic in the unknown.

A great BHAG will cause you to stretch beyond the obvious and beyond the status quo, and committing to a goal that you don't know how you will achieve creates an environment of innovation. Necessity, after all, is the mother of invention.

In addition to energy and innovation, a great BHAG will also provide inspiration. It gives you and the people around you with a vision of what the future might look like if everyone pulls together and gives their individual best to the collective effort.

To find your own BHAG:

Step 1. Know Thyself: What are you just really great at? What gives you that feeling of excitement when you think about it? Can you see yourself achieving this thing? How does it work in with your Perfect Day (see page 3)?

Your BHAG is the kind of project or outcome that inspires you, that you have the potential to do better than anyone else, and if it's for business - that you can make money doing. Understanding what that looks like, and boiling it down to a single organising idea that you can use as a filter for simplifying a complex world is the basic fundamental of the BHAG.

Step 2. Set the Right Mark: Now that you have a clear and intentional understanding of the fundamentals of your BHAG, get started on clarifying that goal. A great BHAG will be easy to understand, will serve as a focal point for your efforts and time management. It should also guide decisions on a daily basis and involve activities that can be summarised on a Goal Matrix. Your BHAG should be clear, compelling, engaging, inspiring and measurable. Remember that the purpose of setting this visionary BHAG is to paint a picture of what a successful future could look like, so your BHAG must also be descriptive. Can you see it in your head?

Once you have the vision, you can start brainstorming your visionary BHAG. What is one clear, compelling and measurable goal that will be reached when the vision becomes a reality? Make a list of potential ideas. You may even be able to combine a few ideas into one measure of success. Which of these ideas seem to convey the feeling and spirit of the vision? Narrow your list down to two or three potential BHAGs.

3. **Question the BHAG:** Once you've come this far, ask yourself the following questions:

- Do you find this BHAG exciting?
- Is the BHAG clear, compelling, and easy to grasp?
- Does this BHAG somehow connect to the core purpose?
- Will this BHAG be exciting to other people?
- Is it undeniably a Big Hairy Audacious Goal, not a verbose, hard to understand, convoluted, impossible to remember mission or vision "statement"? Will achieving the BHAG require a quantum step in the capabilities and characteristics of you and your business?
- In 20 years, would you be able to tell if you have achieved the BHAG?

Now, Allow your BHAG to be a driving influence in setting your short- and medium-term goals. Every year, every milestone and every key initiative should have a direct correlation to your BHAG.

A piece of advice before you get started: Determining a great BHAG is a process not an event. Keep having your Retreats, keep revising your goals, and always test your assumptions. This is not a "done in a day" decision. Your BHAG is an integral part of the envisioned future and strategic direction you are establishing for yourself and your business. You must be willing to invest time and energy in creating one that will inspire and endure for years to come.

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INFORMATION SHEET

The Monday Morning Meeting

Organise your time more effectively with a regular meeting

Monica started having Monday Morning Meetings when she was still at university, and working towards setting up her first business with two friends. Every Monday the trio would meet in the local café and work out what needed to be done during that week to realise whatever goals or milestones they wanted to achieve. Even though the business went nowhere, Monica loved the MMM and continued to have a meeting *with herself* every Monday morning. Now she shares that meeting time with the C+B team, but the principles remain the same.

The MMM* gives you a chance to start your week in a 'business-like' way, just as you might have a staff meeting or a team get-together when you work for someone else. The MMM creates a regular time during which you think about what you need to do for your business, what your goals are for this week, and how you're going to keep yourself on track. Essentially, the MMM creates accountability in your business, just like a boss would.

Some of the things you can do at your MMM :

Go through all the **deadlines** you have for clients this week, and in the upcoming weeks. Are you on schedule? Have you allowed enough time to deliver your work?

If you're making work or **shipping** product, are you on track? Is there anything you need to do this week to make your ship date?

Work out your **financials** for the week. Do you have any bills to pay? Do you need to send any invoices to clients?

Create a Comms List. This is a list of all the people you need to **communicate** with this week. Will you be calling them? Emailing? Skyping or meeting in person? When?

Is there any **research** you need to be doing? Have you made time to read the various email newsletters and subscriptions that you get?

How is your **marketing**? Do you need to make time to update social media or your LinkedIn profile? Does your website need a touch up?

What about **business plans**? Are your goals and larger timelines in order? Are you on track to achieve what you want for your creative business on a larger scale?

Once you've worked through all your time considerations, create a prioritised list of activities that need to be completed this week. Each morning, consult the list and see how you're getting on. You might also like to create dedicated time in your diary or calendar to work on your business, as well as meet clients deadlines.

An additional benefit of the MMM is that it creates a clear distinction between leisure and working time for those who have work at home. It also generates respect for your business, both inside yourself and for others. Taking the MMM seriously helps you to start taking all the aspects of running your own creative business seriously, and that can only be of benefit long term.

* The MMM does not have to be on a Monday - but it does need to be at the beginning of your working week, whenever that is!

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