

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:00:10] Hey there, and welcome to another episode of On Your Terms. I'm your host, Sam Vander Wielen. And this week we're talking all about how to plan for your business in 2022. So, I'm sharing my exact system, and I'm even giving you my exact annual business planning document for free in the description below.

Sam Vander Wielen: [00:00:26] So, in this episode, I'm going to walk you through kind of step-by-step the process that I take to sitting down with the plan that I'm giving you because there's a lot that you have to think about and get organized, and then we're going to map it on to the document that I give you.

Sam Vander Wielen: [00:00:40] But in this episode, I talk with you about how I never used to plan in my business, why I started planning, what really helped me to plan for my business, some of the changes and results that I've seen from doing that kind of planning and things I learned along the way. Like, I didn't plan sometimes that great in the beginning, and now it got a lot better as the year went on. So, I feel like I have a lot to share with you this week, and I can't wait to get into this week's episode.

Sam Vander Wielen: [00:01:05] But before I do, I'm doing something new here in On Your Terms, and I want to give a shoutout to Lindsay, who's at Little Foundations on Instagram. Lindsay left a very kind review on Apple Podcasts for On Your Terms, saying, "Sam's Ultimate Bundle is a no brainer. Hands down the best thing you can do for your business. Sam is the greatest. And, now, with her podcast, workshops, and trainings, she's changing even more lives. She is so gracious to share her journey and give behind the scenes tips and actionable steps to change your life just the way she did. Sam, I'm so incredibly grateful." Well, Lindsay, I am very grateful to you and thank you so much for leaving that review for On Your Terms.

Sam Vander Wielen: [00:01:41] In case you haven't heard, if you leave a review for on your terms on Apple Podcasts and let me know what your handle is on Instagram, I will

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

give you a little shoutout on a future episode. So, head on over to Apple Podcasts and make sure you leave a review for On Your Terms. All right. With that, thank you again, Lindsay.

Sam Vander Wielen: [00:01:57] Let's get into planning for 2022. So, I know this might come as a surprise to you, but up until this very past year, like 2021, for the very first time, I never did any sort of business planning. It was always like a fly by the seat of my pants. Like, "Let's try this, let's try that. Let's just mix this in." And I had no real direction or I just had no plan as to what I was doing at any given time in the business.

Sam Vander Wielen: [00:02:27] At the same time, I had a really solid focus on I have very limited products. I focus on those products. I focus on my calls to action. But I really just didn't know what I was going to do day-to-day, month-to-month, whatever in my business. So, until this year, that is literally how I operated my business and it worked for me for a while. But, now, that I have seen the other way in the way that you can do it, there's no going back now.

Sam Vander Wielen: [00:02:55] So, I realized through planning that after this past year, first of all, just how much better, financially, that made my year better. Mentally and emotionally, it made my year better because I knew what was coming. I could hire the right people to help, you know, everybody on the team knew what was going on. All that good stuff.

Sam Vander Wielen: [00:03:14] But I also realized that it's really that important to have a plan because you need to reverse engineer in your business. And that's a lot of what we're going to talk about today is, like, coming up with the plan and then backing up and coming up with all the tasks that have to go along in order for that plan to come to action.

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:03:31] So, if, for example, you were going to host an event, like a live webinar or even just run a promo or a sale or something in March, then you've got to backup and plan out several weeks ahead of time. Like, typically, there's a tease week, for example. So, there's a week of like, "Hey, I have something coming. I have something coming, something big. I'm going to make a big announcement."

Sam Vander Wielen: [00:03:52] Then, you have the invite week or maybe even two weeks. If you're going to invite them for two weeks to sign up for a free workshop or some sort of live event or a challenge. Then, you're going to actually host that thing, host the live event, host the challenge, do the video series whatever it is. Then, you're going to actually sell or you're going to have a sale period for however long that's open for and you're going to nurture them during that sale period. And then, you might even have a down sell period afterwards for people who don't buy to give them some other option.

Sam Vander Wielen: [00:04:19] So, there's a lot more than just like, "Hey, I'm hosting a webinar on Wednesday." Now, I realized that in order to make these things successful, there really does have to be a plan in the future. And then, some reverse engineering to backpedal and say, in order to have that event go off on that day or to run that sale for that week in March, I know that I have to do all these other things leading up to it. And, really, the only way that you can do that is if you actually plan. Because if not, you're going to be in reaction mode and not in planning or execution mode.

Sam Vander Wielen: [00:04:51] And so, what I used to do and what you might be doing now is, like, just kind of seeing how things feel. Like, I feel like I should run a sale because things feel slow. Or, I feel like once every summer and once every fall, I run this because it's just the time of year and I just go with it. But I don't really think about it on the whole, and I don't think about what's necessary in my business in between, you know, in order to really successfully run those things.

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:05:17] So, there's a lot more to it than just coming up with a random day and being like, "I think I'll try this." Or, "I feel like talking on social media today about meal prep." It's much bigger than that. There's a lot more to it.

Sam Vander Wielen: [00:05:30] You don't want to stack also too much in, like, one quarter or one part of the year. You also don't want to have things built up too close to one another because you're going to find that you're going to run out of leads, enough fresh people to sell these things to, or who are interested in your offer. So, this is all going to make sense when we talk through this annual planning document that I have for you.

Sam Vander Wielen: [00:05:53] You might even want to take the time now to pop open the document that I have for you in the notes of this episode down in the description. It's my gift to you. It's my business planning documents, what I use in my own business. It's part reflection, part planning. They're both equally important. But I would say that you could follow along with this episode if you wanted to.

Sam Vander Wielen: [00:06:14] It was about this time last year in 2020 when I sat down to plan 2021. And I realized at first, I thought I was kind of cutting myself short. I was like, "Planning is going to keep me locked down somehow." It's going to be really limiting and feeling like if I have a plan, that means I can't do anything. Like, when I come up with an idea, I can't do it. Or like, what if something changes between now and then, and I want to make a change to that? What if I have a plan that's really limiting? I felt really limited to it. And I was so used to this just fly by the seat of my pants thing and go, go, going that making a plan made me really nervous.

Sam Vander Wielen: [00:06:56] And there was also this reaction when I first sat down and did the annual planning - that I'm going to do with you today - that I thought, like, there's no way. This thing that I planned for, I have so much more that I can do than

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

that. I thought I was so limited. I was like, "Only one big live event per quarter, that's so limiting." But I'm so glad that I did.

Sam Vander Wielen: [00:07:18] And I'm so excited to pass this along to you today because, not only did it help me maintain my sanity, but, also, I learned so much about actually properly preparing for launches, promos, sales. Just a period of time where you're going to focus on a product or a service, whatever it is. Because you have to have enough people who are interested. And so, if you are, like, launch, launch, launch, launch, launching, and you're not taking the time to nurture your audience, not only nurture your audience, give them a break in between, but also finding new people for your audience so that you're not just pitching the same audience, the same products constantly then you're going to run into a brick wall.

Sam Vander Wielen: [00:07:58] So, a lot of that we're going to talk about today. So, when I did look at my plan for the entire year for 2021, I did feel like it was a little slow. And I felt like, "Oh, man. There's so much more I could be doing." In reality, what it turned out was that the launches or promos were way more successful than I would have thought they would have been because I think directly correlated to how much time and attention was put into them. But, also, the projects felt really useful, I would say.

Sam Vander Wielen: [00:08:28] Like, there's a lot of hubbub people talking about like launch time, and promo mode, and being really hectic, and just really out of it and frazzled. And I didn't feel that way. Sometimes during those periods, those two week periods where we were doing a promo, it was just like, "Oh, yeah. There's a promo going on." I wasn't on my phone anymore than I normally would be, which is too much. But I wasn't on my phone anymore and things weren't hectic. My day wasn't filled to the brim or anything like that. And that came down to planning.

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:09:00] So, the only other thing I want to talk to you about before we get into going through this document together and kind of my tips for best planning out your year is that, one of the only ways that I could do this last year - so this time last year, I sat down and I started doing this 2021 planning - I joined Louise Henry's Uplevel with Asana course. And this is not sponsored or anything like that. I do have an affiliate link below that gives you \$100 off of Louise's course.

Sam Vander Wielen: [00:09:29] And you know this if you're in my member community or you're one of my friends, you know, I talk about this all the time. It was just truly one of the best investments I ever made in my business. It was a pretty affordable investment to make at the time. And I just can't say enough about Louise Henry's Uplevel with Asana course because it was the thing that allowed me to take everything that we're going to talk about today, and how to plan for the year, and actually put it into a project management system that was really doable, that kept me on task.

Sam Vander Wielen: [00:10:03] And this time last year, I had nobody working for me. Maybe I had just brought on my VA a little bit part-time and then brought on my tech VA pretty shortly after. But I didn't have all the people I have today. And so, it was great because I took this time last year to plan my entire year and then also to get Uplevel with Asana, which it's a pretty short course, really doable, digestible course. And Louise gives you all the templates that you need for all the different projects inside of Asana to run your business. So, it's literally worth the cost of the program alone just for those templates. But I literally took those things and I put them into Asana, got everything set up.

Sam Vander Wielen: [00:10:41] And then, when I did start to bring on contractors or when I started to hire people, it was amazing because then I had the system set up and I could just plug them right in. So, again, #notsponsored. But I just love Louise, and I love the program, and I was so happy with it. And I'm one of those people that

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

whenever I'm happy with something I want everybody to know how great it is and to enjoy it too.

Sam Vander Wielen: [00:11:02] Okay. With that, let's get into some of my tips about how to plan for your entire year. So, my first tip about planning for the whole year is actually not to plan the entire year in detail or at least in the same level of detail. So, tip number one, it's all about planning quarter one in more detail than a bit of quarter two, and then kind of go down from there. So, you would have more of a rough estimate, I would say, for quarters three and four the further we get along in the year.

Sam Vander Wielen: [00:11:31] The reason is that because you might adjust as you go. So, the first time I did this last year, I pretty heavily planned out the whole year. And then, it was pretty quickly into the year that I started to learn a lot from what I was doing. I learned how I was running a promo for the first time. I created a new webinar for the first time. I ran a charity workshop for the first time. So, I did all these things for the first time.

Sam Vander Wielen: [00:11:56] And with that, I started to learn like, "Oh. Okay. I feel like I've been writing a lot about these promos to my email list. I want to back off and I want to give more time." So, I know I had planned to do this other promo in, like, November and December. I'm going to cancel that and I'm going to back off and do something different. So, it gives you this ability to adjust, which I think is really helpful.

Sam Vander Wielen: [00:12:16] And, also, I would rather see you take the time to just really hammer out quarter one, maybe parts of quarter two as well, and let yourself just have a rough idea as to where things are headed. But just use the data from how the first part of the year goes to seeing how you want to respond in the latter part of the year. So, really, we're going to focus on quarter one. We'll kind of get an idea of, like, how this all works for the whole year.

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:12:43] So, after we have just kind of adjusted to mentally focusing on quarter one, possibly a little bit of quarter two as well, I also think it's time to take some time to reflect on this year and see what's worked, what hasn't worked, what we want more of. And if you don't have a business yet or something like that, you might just want to stay with me more to the dreaming side of things. Like, what do you want things to look like? How do you want things to be?

Sam Vander Wielen: [00:13:09] So, if you open up the free planning document that I've given you in the description below, you'll see that I've broken it up into sections. So, the first section is all about reflection.

Sam Vander Wielen: [00:13:19] And so, I want you to reflect back on 2021 and I want you to think about, you know, you can list out the things that you've accomplished this year, the things that you've let go of this year - that's one of my favorites - things you added and how it felt, things you took away and how it felt, what we didn't get to but which we did, people who were crucial to your success, and so on and so forth. So, you can open up the document. You can see everything in there. I've left space for you to add bullets or whatever you want to do. But I think this is really, really helpful.

Sam Vander Wielen: [00:13:47] So, in the things you accomplished this year, I want you to focus on that broadly. I think sometimes, I would say, it's popular to focus on some of the more metric-y things, like how much revenue you made or how many followers you gained or how much you built your email list. And I think that's really important, too. But I would encourage you to focus on things that you have accomplished that you're really proud of, maybe, more internally. Like, you started setting more boundaries, or you took Fridays off, or you logged off of Instagram at 8:00 p.m. at night on most nights, or something like that just to make sure that you focus on things that you're really proud of.

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:14:23] And I would really encourage you to tap into some things that you're excited about that you helped clients with. Some sort of success story, or a session that made you feel great, or a really kind note that you got from somebody one time saying how much you helped them, maybe it was just even somebody who watched something of yours on social media. I think it's really important to pay some gratitude to those smaller moments.

Sam Vander Wielen: [00:14:45] I know for me the section on things I let go of this year was even longer than some of, maybe, the accomplishment section. And that's equally as important. So, letting go of being tied to your revenue, letting go of free calls, maybe some of you have let go of those. There are all different kinds of things you might have let go of, but you want to take some time also to pay homage to, I think, some of those. So, it's really important that we take time to reflect.

Sam Vander Wielen: [00:15:12] And then, we do a little bit of future casting. As you'll see in the document that I've provided to you below, you'll talk a little bit in that document about how you want to show up in 2022. Because you really want to spend some time with this section. And, of course, because it's me, I really suggest, like, lighting some candles, having your coziest blanket, playing some nice music. I love the Deep Focus Channel on Spotify. So, I would highly recommend just taking some time to really get in touch with how you want to show up in your business.

Sam Vander Wielen: [00:15:44] What's the impact that you want to make? How do you want to feel in your business? How do you want your days to look? So, what do you want your days to look like? Do you want to be on the computer mostly? Do you want to be more flexible? Do you want to be on your phone less? Do you want to be on social media less? Do you want to be on camera more? So, it's really important to list out some of those things because then that's going to influence. You can see if this matches up.

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:16:05] Like, if you say you want to be on your phone less and you want to be on social media less, but then we go and we look at some of your goals and your projects and all these things that you're putting into 2022, and they all require constant social media presence. That might be an issue. So, I think it's a really good idea to just take a little bit of time. All the questions are in there for you. These are the same exact questions I answered in my own business, so I highly recommend them. They've been super helpful.

Sam Vander Wielen: [00:16:31] So, from there, you'll see that in the document we go on to, basically, planning out events or projects that we want to tackle this year. So, one of the best places to start is to really figuring out what are the major events, live events, promos, sales, what are the big focuses of your year. And you might want to list those out. Because then those are going to be the things that you take and you plug in to the calendar for the whole year and we spread them out appropriately and reverse engineer to make sure that we're taking the steps leading up to them.

Sam Vander Wielen: [00:17:05] So, maybe you want to run a live webinar once or twice, or maybe you want to revamp a product that you have, or create a release on an entirely new product, maybe you're going to release more of a social channel, like a podcast or YouTube channel or something like that. And I'm just talking about major, major projects, like the big things, the big promos. Maybe you know you want to do a Black Friday sale, or you know you like doing a birthday sale either for your actual birthday or the anniversary of your product itself. That's something I played with. This year, I did a birthday sale for the bundle.

Sam Vander Wielen: [00:17:41] And then, you know, this year I hosted a charity workshop. So, if that's something you know you would love to do, like host a paid workshop, it can be pretty low ticket. But all of the money goes to some charity of some sort. Like, all of mine went to the Leukemia and Lymphoma Society in honor of my dad. So, you could do something like that. Those are the kinds of projects that I'm talking

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

about. So, live webinars, challenges, big sales, promotions, that kind of stuff, that's what we want to do. Obviously, we have some sort of in-person, if you were hosting an event or something like that, that would be another example.

Sam Vander Wielen: [00:18:16] So then, what we want to do is we want to take all of those major projects and we want to spread them out across the year. Because we don't want them all stacked in one place or another. And we want to give ourselves enough lead time to, not only promote them properly, but also to nurture our audience and bring in new leads in between those different projects. So, basically, I try to stick around one, maybe two, major events per quarter. I would say, though, if they're going to be live, that I tend to focus on one event per quarter and then it would be some other thing.

Sam Vander Wielen: [00:18:48] Maybe I would do a live webinar in quarter one. But I would be behind the scenes, maybe working on a new project, or updating a current project, or coming up with a new product that I'm going to come out with in Q2. So, you'll see once we get into the planning document that what you're actually putting out into the world section, that quarter, but also, internally, what you're working on and planning on to put out into the world in the future.

Sam Vander Wielen: [00:19:16] Because if you're following my system, you're going to be spreading these things out and you're going to be focusing on kind of one project at a time. But then, you're also going to be simultaneously needing to do the things that you have to do to get ready for the next project to come out in the next quarter. So, it's a little bit of both. But I tend to spread these out, especially the live events, I tend to do only one per quarter.

Sam Vander Wielen: [00:19:37] You have to remember that you're going to be full of hope. I hope you will be full blast promoting this thing. So, you're going to be doing this on social media, emailing your email list, doing all the things. If you have a podcast or

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

YouTube channel, you're going to be talking about it there. And so, if you're doing more than one or several back-to-back in a row, it's just going to be too much because you're going to be blitzing your audience with this stuff all the time. And I think there's a little bit of fatigue when it comes to your audience.

Sam Vander Wielen: [00:20:07] So, I also want you to remember that during this time, if you have the same reaction I do, and I looked at my calendar last year and I was like, "So, I'm doing one live event per quarter? Like, that's it? I can't believe that." But I forgot about how the day-to-day is still focusing on lead generation. Also, doing PR and marketing.

Sam Vander Wielen: [00:20:27] So, every day when it wasn't in the few weeks leading up to this event, I was sending people to my freebies, I was speaking on other people's podcasts, I was recording my own content, and I was working on lead generation strategies by writing blog posts and creating YouTube videos, and doing all of the things. So, there's still a lot going on. But in order to give yourself the space and the capacity to actually focus on that, you've got to spread this stuff out.

Sam Vander Wielen: [00:20:54] So, once we pick kind of the one major live event or the thing that's really going to require a lot of your intense focus for a period of time per quarter, now, we're going to work backwards, especially when it comes to quarter one.

Sam Vander Wielen: [00:21:08] So, let's say that in quarter one you know that on February 14th you want to host your live event. That's the date of the live event. That's kind of the first thing I do. So, I decide like, "Okay. What's my focus for quarter one? It's going to be a live event, live webinar. And I'm going to host it one time on February 14th at this time." That's the very first thing that I do.

Sam Vander Wielen: [00:21:30] Then, I start working backwards and I think, "Okay. I know that I want to invite people to sign up for that live event for two weeks. I want two

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

full weeks to be able to email my email list, to show up on social media, to create podcast episodes with a call to action, to come to this event. So, that's two full weeks.

Sam Vander Wielen: [00:21:49] Back up one more week and that's going to be - what I call - the tease week. So, that's going to be the week where I start emailing my list about something else and then in a P.S. or somewhere in that email, I say, "Hey. I have a big announcement coming on Monday." And then, on social media I start saying, "I'm making a big announcement starting on Monday." The Monday that's two weeks before February 14th. So, that's the tease time.

Sam Vander Wielen: [00:22:14] Now, after February 14th is probably your promo time. So, there's probably either like an open cart, or there's a promotion, or a sale of some sort. And so, that's like a week or two out is your focus after February 14 - in this hypothetical example - is promoting whatever it is that you've got going on.

Sam Vander Wielen: [00:22:35] After the promotion, we have about a week that I always build in for follow up time, follow up time or down sell time. If you do a down sell, meaning that for those people who don't buy whatever the thing is you're promoting, you maybe offer them something different. Then, I want you to tack on some follow up time after the down sell time. So, it might even be an additional two weeks after your promo closes.

Sam Vander Wielen: [00:22:57] So, I always follow up with a little bit of a survey asking people, like, why they didn't buy, or if there was something that they wish they would have seen, or something like that. It's a really helpful time to gather some data. It's also a good time to kick back up your nurturing.

Sam Vander Wielen: [00:23:11] So, now, we go back into nurturing the people who are already on our email lists, already following us on social media, thanking them for sticking with us through a promo and everything like that. And shifting our focus back to

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

being like, "Oh, yeah. I need to build up my audience again to get ready for quarter two." Because when you hold the next thing in quarter two, you're going to need to have new people, fresh audience, in order to promote this again. Because, ideally, you've taken a chunk of your audience and you've maybe sold to them already now in quarter one. So, you're going to need to replace them somehow.

Sam Vander Wielen: [00:23:44] But you also have a chunk of people who just saw this offer and decided to say no. So, if you run the same thing, if you run another live webinar to the same product, or something like that, you're going to have a group of people who are still saying no. And unless it's just that the timing is right for them, you might also want to have some new people.

Sam Vander Wielen: [00:24:00] So, trust me when I tell you it is really important that in between these promotions, you kind of flip back into lead generation mode. That means pointing people back to signing up to get onto your email list however they can do that, like getting a freebie or whatever. You know, you want people to be consuming your more evergreen content, like your podcast or your YouTube videos or your blog posts something like this. And you can focus on PR as well. So, if you're getting interviewed on somebody else's podcast or you're writing an article for somebody or getting featured in something, you're going to be drawing in new audience.

Sam Vander Wielen: [00:24:37] And after years and years of doing this, the cool thing is that this starts to kind of snowball and build up itself. So, I have a lot of people coming in now all the time because they're hearing me on a podcast that I was on, you know, five years ago, four years ago, three years ago, two years ago, and it's just constantly flowing in. As well as they're finding me through Google and through YouTube and now my podcast for On Your Terms. So, it's something that the more that you put into this, I think, it gets a little easier over time in the sense that it's more consistent.

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:25:06] And it can feel in the beginning, like, you're doing all this and you're only getting a handful of people. But I'm telling you it snowballs and it has a spiderweb effect. People will invite other people. They'll tell other people about you. They'll share your stuff on social media. And you can build in some of that yourself. You can encourage people to share about your podcast. You can encourage people to share your posts. You can encourage people to share about your freebie. So, you can really drive the boat there, too, and encourage them.

Sam Vander Wielen: [00:25:33] So, now that I planned my quarter and my quarterly focus, I then go down to breaking it down month-by-month within that quarter. So, I put what I'm focused on for that month and then what I'm planning for that's coming up.

Sam Vander Wielen: [00:25:49] So, in quarter one, for example, I might be focusing on behind the scenes, all the stuff that we need to do for the promo for any sort of live webinar that we're hosting. But then, in my day-to-day work, I'm probably working on a new product that it might be coming out within quarter two. Or I'm working on editing and revamping the current legal templates that I have, and I always provide those to my customers. So, that might be kind of what I'm focusing on behind the scenes.

Sam Vander Wielen: [00:26:17] So, you'll see in the document that I gave you, I have the monthly focus overview section where I talk about I have focus. And so, the focus might be some sort of live event. And you might be internally having to execute three different things, like prepare my webinar slides, get new client testimonials, and write email sequence for the live event. That might be kind of your internal to-dos, which you'll understand when you see the document.

Sam Vander Wielen: [00:26:48] And then, you'll see there's a section underneath called Prep. I might be prepping for something else that's coming up the following month that's unrelated to the live event at hand. So, this is just the way I do it. This makes sense in my brain. This document should be editable. If not, you can kind of use it to

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

make your own. You know, just make this your own thing and you do what works for you.

Sam Vander Wielen: [00:27:09] But that's kind of what makes sense to me because I realized over time that it wasn't just what I was focused on that month. I also had to be focused on whatever was coming up ahead. So, it's a little bit of both. Like, taking care of what's going on and then being like, "Oh, I have to start getting some of these things in place or outsourcing them so that somebody else could start to take care of them."

Sam Vander Wielen: [00:27:32] Have you ever felt lost about where to begin with the legal side of protecting your online business? Some people say you can just wing it at the beginning and get officially set up later. Not a good idea, by the way. Whether you're afraid to even start working with clients because you don't want to do something wrong legally and then get in trouble or your business is growing and you sort of forgot to take care of the legal pieces, I've got you.

Sam Vander Wielen: [00:27:55] I don't want you to live in fear of the internet police coming after you and your business. But you do have to do certain things and get certain things in place in order to legally and safely run your business online. As much as it just feels like an unregulated Wild Wild West online, that is very much not the case.

Sam Vander Wielen: [00:28:12] As an attorney turned entrepreneur and former corporate litigator, I can assure you that there are rules. There are real steps that everybody who runs or starts an online business needs to take. And you're not behind at all. We can get you set up and following the rules right away. In fact, we can even do it today.

Sam Vander Wielen: [00:28:28] I want to teach you the five very simple steps to take to legally protect and grow your online business. You don't need an MBA to be a successful entrepreneur and stay out of legal hot water, but you do need to dot your

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

legal I's and cross your T's in a few key areas that can't be skipped. That's exactly what I'll teach you in my free one hour legal workshop called Five Steps to Legally Protect and Grow your Online Business. Just head to mylegalworkshop.com, drop in your email address, pick the time, and I'll send you a link to watch the workshop video whenever you have time.

Sam Vander Wielen: [00:28:58] This is the best place to begin if you're just getting started legally legitimizing your business, so head on over to mylegalworkshop.com and sign up to watch Five Steps to Legally Protect and Grow your Online Business now.

Sam Vander Wielen: [00:29:14] Now, one of the most helpful things about planning it out this way is that you'll start to see pretty quickly where you're going to need help in executing these projects, especially what kinds of things that you absolutely have to do as a CEO of your business. And which things would, not only be better for somebody else to do, but just that would allow you to actually focus on the things that the CEO needs to focus on.

Sam Vander Wielen: [00:29:36] So, for me, when it comes to a live event or a webinar of some sort, I feel like it's really worth it to have a copywriter who writes sales copy. That's the copy that gets sent out to people on the email list following up that live event. That is super helpful because it's super strategic. It goes to the bottom line. And it's something that's really high skilled - it should be - that somebody should have much more expertise than me. And it allows me to prepare the actual webinar content to show up.

Sam Vander Wielen: [00:30:05] For me, I usually do the live event two or three times. So, I have to show up, it's usually eight hours total of that. I answer everybody's questions. And then, until we find a really good body double for me, I have to show up on social media live during that promo window and invite people to come to the webinar in the first place. And then, for two weeks, invite people to purchase my Ultimate

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

Bundle. So, it's a lot of me time. And so, when I'm planning these things out, I'm looking for anywhere that I can bring in the experts and take someone in.

Sam Vander Wielen: [00:30:40] When I was starting doing this, obviously, I did it all myself. And that was fine. It's a good way to get started. But as you're moving forward or for any of you who are in that position, I would start to look at, you know, where can I offload some of these things. I would really encourage you, too, that you don't want to hold on to these pieces too long yourself, because at some point you're actually holding your event or your promo back from the full amount of success it can get.

Sam Vander Wielen: [00:31:05] Because if you can get, for example, a copywriter to write a sales copy for you or to write the landing page copy, that is going to convert so much more highly than it will if you write it, unless you are one of those people yourself. So, it's just one of those things where we can, like, sometimes hold back on investing in that way. And it's something that's really going to actually increase our revenue. So, I would encourage you to reach out.

Sam Vander Wielen: [00:31:29] Whenever I'm doing my business planning for the year, I also like to address any goals that I have both business and personal. So, on the business side, you'll see that I've put some of the, you know, classic ones inside of the document of like, what would you like your annual revenue to be? And then, I encourage you to break that down by month and by week. And then, I also want you just to really focus on what quarter one and quarter two revenue might be because it might adjust your goals accordingly after those two quarters.

Sam Vander Wielen: [00:31:58] So, for me, last year I, in quarter one, hit my entire annual goal, so that changed pretty quickly. And so, that's a good example of why I don't spend too much time planning the last half of the year because I want to be able to adjust. And, you know, having done so well for most of the year also caused me to want to just step back a little bit. So, it was like, "This was really great." So, I'm okay taking

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

one or two of these events off the table later in the year to give us more time to rest, and recharge, and get ready for 2022. So, that's what I did.

Sam Vander Wielen: [00:32:32] So, as you're planning all of these out, I want you to, you know, sketch out any of these goals you have. Maybe you have some other goals, I would love to hear what they are. I hope you'll share them with me. Send me a DM on Instagram. But you might come up with some specific goals like, "I want to have ten thousand unique listeners on my podcast," or "I want to be featured in a major magazine," or "I want to speak on stage at a conference." Don't be afraid to list out some of those goals as well.

Sam Vander Wielen: [00:32:59] And then, I want you to go back and I want you to look at the way that you're planning out your year and these events that you're putting on the calendar. Do you see things on that calendar that are supporting these goals that you're speaking aloud? So, if you want to speak on other people's podcasts, for example, or you want to speak on stage, then I hope that you're building in a part of your year where part of the focus is PR outreach. You're reaching out. You're applying to be on people's podcast. You're networking with people who have podcasts. You're listening to some classes or educating yourself about how to get featured on podcasts, that kind of stuff.

Sam Vander Wielen: [00:33:36] So, it's just helpful to step back and be like, "Oh, I'm actually not doing anything. I'm just creating a goal and making it kind of lofty." And just sending out into the universe isn't going to really help unless we actually look at our plan here and see if anything is fitting is supporting that goal. Is anything that you're planning getting you any closer to that goal. So, that can be really, really helpful.

Sam Vander Wielen: [00:34:00] Just like if you have a goal to get X amount of listeners on your podcast, or X number of followers, or email list subscribers, then you have to be looking at your plan for the year and seeing where are you generating enough traffic to those sources that you would hit those numbers. The stuff really is we can sometimes

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

make it look a lot bigger and more complicated than it really is. But, you know, if you want to have 10,000 email subscribers, then you need to be sharing your freebie or some entry point into your email list a lot, right?

Sam Vander Wielen: [00:34:30] And so, are you looking at your plans and thinking once every quarter, you can take one month and focus heavy on your freebie and driving people there. And if you have a podcast or YouTube channel, you're going to be telling people about your freebie constantly. So, we want to make sure that the plans that we're putting into place are actually supporting this stuff.

Sam Vander Wielen: [00:34:50] I also do want to encourage you to make some personal goals and see how your business can help you support your personal goals. So, if your personal goals are, like, to be more present and not in your phone so much, making sure that we're not setting so many business goals that are focused on in time social media, things you can't batch, things you can't prepare, things you couldn't give to a team member or somebody who works for you, a contractor to implement or post for you. So, you can take that into account, too, when you want to come up with your personal goals.

Sam Vander Wielen: [00:35:23] And then, the last but not least, I want to encourage you - this is something I started doing, like, mid-year this year, and I just really loved it - to come up with daily non-negotiables. So, at least for me, these were personal non-negotiables. And so, my daily non-negotiables were to take my vitamin D drops, to take my multivitamin, to walk outside for at least 15 minutes - and there was something else - to drink a large bottle of water because I'm really bad at drinking water, and to do my little skincare routine before bed. So, those were my daily non-negotiables.

Sam Vander Wielen: [00:35:57] And I actually input them into Asana so they pop up for me every single day. I have a little task called Daily Non-negotiables, and I have to go in and actually check those off every day that I did them. And they might sound really silly

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

and simple to you, but for one, it's been a really bad three years, so don't judge me. So, I'm trying to take care of myself. Two is that, it doesn't have to be fancy or complicated. It's just something that are these little, like, micro-commitments to yourself.

Sam Vander Wielen: [00:36:25] First of all, it helps to build confidence by you making this little plan. And then, if you actually stick to it, you will feel more confident and proud of yourself. So, that's one thing. And two, because they've been so simple, they're really doable. So, I've done it every single day for months and months and months, and I see effects from it, and I feel better, and all that good stuff there.

Sam Vander Wielen: [00:36:43] I would also suggest if you have Asana, or you use something else like ClickUp, or maybe there's some other one called Monday or something, I don't know. I use Asana. But if you're going to set up some sort of project management system, I would really encourage you to also set up weekly tasks and then a daily recurring task. And in there, I want you to put the things that you absolutely have to do every day or week in your business in order to be successful.

Sam Vander Wielen: [00:37:08] So, for your dailies, these might include stuff that you just kind of like have to do. So, for me, this would be, like, I have to check my inbox and I have to respond to the things that are needed just for me to respond. So, there might be legal questions from someone or product questions from someone, maybe some PR stuff or something like that. And then, go into my customer community. I have to do that every day and answer their questions. And I also check in with my team. I check Slack, I check those messages, and all that kind of stuff. So, those are kind of my three daily non-negotiable things that I have to do for my business.

Sam Vander Wielen: [00:37:40] And then, weekly, I have things like clean up my Asana, clean my office, check my finances, move money over like put more in savings, things like that. And then, I even have monthly. Like, uploading my monthly financial documents that my bookkeeper can do what she needs to do, all that kind of stuff. So,

On Your Terms Podcast Episode 22:

How to Plan Your Business Year (planning workshop and free guide!)

it's really helpful to set those because they are little mental energy tasks that go on in the background that you don't even know are happening, but they actually take a lot of energy. And so, it's really important that you just get a system in place.

Sam Vander Wielen: [00:38:11] I think that between planning 2021 and then having that Asana system after taking Louise's course, like I said, just really, really changed the game for me because it allowed me to be so organized and then actually execute these things. Because everything that we're talking about today, it can feel really overwhelming if you don't have some sort of system in place. So, I think the more that you can just systematize and automate these things, you will thank me later.

Sam Vander Wielen: [00:38:36] So, how do you go about then actually executing everything that we've talked about today? How do you come up with this plan? So, I would pick a half-day soon to set aside, reflect, and plan. I personally like choosing a timer on the holidays, maybe right after the holidays in January. It can feel a little hard to get up and running. Everybody always has so much energy and I'm like, "I'm still sleepy from the holidays."

Sam Vander Wielen: [00:39:00] But I would suggest picking a few hours before or after lunch, and you will just set this time aside. Like, block it off in your calendar, put it in your Asana, silence Slack, silence your phone, put on Do Not Disturb, do all the things. And I would, honestly, open up this document that I give you. You could read or listen to this episode or just have this episode open while you have the document open, and go through it with me kind of step by step.

Sam Vander Wielen: [00:39:26] Because it's really important to look at where we've been, and what's worked in the past, and what we want to feel and act like, and then make sure that that's actually lining up with the plan that we're making for moving forward.

On Your Terms Podcast Episode 22:
How to Plan Your Business Year (planning workshop and free guide!)

Sam Vander Wielen: [00:39:40] So, I would love for you to tag me on Instagram @samvanderwielen as you're planning. Let me know how it's going. I can't wait to see what you do in 2022.

Sam Vander Wielen: [00:39:50] I can't wait for next week's episode because in next week's episode, I'm actually sharing a special personal episode where I'll be doing my own personal reflection of 2021 in my business. I'm going to share all behind the scenes of what I did in the business, how it went, what I wish I would have done differently, what I learned, all the lessons I took away from it. And I'm going to be forecasting a little bit about what I'm planning myself for 2022, how I'm going about planning.

Sam Vander Wielen: [00:40:15] So, you're definitely going to want to check out next week's episode on December 27th, I want to say, that comes out. Because this year, I went from a multi-six figure business to multi-seven figure business, and it's just bananas. And it was a lot of change, and it was awesome, and a lot of fun, and I learned a lot. And so, I'm really, really excited to pass on some of that to you.

Sam Vander Wielen: [00:40:41] So, before you go, make sure you check out the free annual business planner guide that I put for you below. The link is in the description. I'll also drop the link to Louise Henry's Uplevel with Asana course, for \$100 off as well. It just was so, so helpful to me.

Sam Vander Wielen: [00:40:56] Until then, I can't wait to hear from you on Instagram about how your annual planning is going. Tag me in your stories as you're doing your planning because I can't wait to celebrate you. And thank you so much for listening to On Your Terms.

Sam Vander Wielen: [00:41:10] Thanks so much for listening to the On Your Terms podcast. Make sure to follow on Apple Podcasts, Spotify, or wherever you like to listen to podcast. You can also check out all of our podcast episodes, show notes, links, and

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How to Plan Your Business Year (planning workshop and free guide!)

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