

**On Your Terms Episode 75:**  
**How to Plan Your Business Year [free guide!]**

**Sam Vander Wielen:** Hey, there. And welcome back to On Your Terms. I'm your host, Sam Vander Wielen, an attorney turned entrepreneur who helps online coaches and service providers legally protect and grow their online businesses using my DIY legal templates and my Ultimate Bundle program.

This week, we're talking all about how to plan your business year. So if you've listened to the podcast for a while, you might remember that I did episode 22 last year, which I can't believe now. I've had On Your Terms long enough to do a repeat themed episode. So that's super exciting. And last year, I talked to you all about what it was like to plan my business here, how I planned a 7-figure year, how I was going to plan a 7-figure year again.

I guess I'm happy to be back to tell you that it worked. I hit everything that I said in episode 22. And as you might know, if you've been following along, I hit everything despite a number of really big personal challenges. Like losing my dad to cancer the summer and all that good stuff. So it's pretty wild that I still did it. I don't know. I don't know. It is wild. So I appreciate you being here and listening.

I think that this episode is going to be a really cool one. If you've already listened to that episode or not, but it's like the updated evolved version, I think. I think last year I planned differently than I planned this year, which like I said at the end of this episode, is always the goal, right, to evolve and get better overtime.

So I like the way I'm planning this year better than the way I planned last year. It's very similar, except that it's less

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goal-based and a little bit more data-driven and then really trying to space this out for you to give you more white space and time to take care of yourself as well, which I see as taking care of your business too. So that's what I dove into in this week's episode.

Before I let it rip, I just got to give you a quick review of the week here from Beatrice OB who said, "Sam is awesome. I'm loving the business advice episodes and her three day business webinar is dope. Truly incredible info. Her Ultimate Bundle is killer too. Everything Sam has to offer is pure gold, truly. I love, love, love the podcast. Sam is really great to work with and very down to earth and gets real with you which I so appreciate, no lies. Her authenticity really shines. I hope she continues to talk business advice. The podcast overall is killer, like all of Sam's work."

Well, thank you so much, Beatrice OB. I do have business episodes here and there because I just love it so you can't keep me from talking about it. But I so appreciate you leaving that kind review. If you leave a review in Apple podcasts of my show, On Your Terms, you'll be entered to win a \$20 Starbucks gift card. I pick a new winner every single month, so please give us a little review, quick review, rating on Apple Podcasts. Or if you listen on Spotify, review for the stars. That would be so helpful. You might even get a shout out in a future episode.

All right. With that, let's get into how to plan our business year. So I shared before that before the end of 2020, I used to go without a yearly plan and it really left me in this place of, okay, I'll try this, now I'll try that. I was just super reactionary. And throughout the year, I was literally reacting

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and pivoting and I don't know. Almost in my mind, I picture this guy playing football who is dodging people left and right. That's kind of what I was doing throughout the year because I was like oh, revenue is not good enough, let me play on this. And like, oh, now this is too stressful, let me stop that. And it was just very reactionary.

I really got like - I feel like a full education in the importance of reverse engineering and how much planning it really takes to get not only something off the ground, but to truly do it right. Sometimes to the team - this sounds like harsh language, but sometimes to the team we talk about things being an all out assault, right?

And really, what I mean for that, for marketing purposes is that our email game is tight, our social media stuff is tight. Like stuffs going on the website, stuffs going on the podcast. Like it's a very all in, all-encompassing approach that I take to marketing. And in order to do that and to do it well and to not feel super stressed out and be running around like crazy, you really have to do a lot of planning and a lot of reverse engineering.

So if you're going to host a live event in May, like a live webinar for example, you're going to host a live webinar in May, you've got a backup and plan, right? So at least the way that I plan it is that at least a week before your event, so let's say your event is May 1st, for at least a week before your event, you're going to be inviting people to the event like hardcore, right? Like every day on social media, in your email, on your site, on your podcast, whatever.

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For a week before that, I would be teasing that something's coming, right? So there's two weeks before the live events. So basically those two weeks in April, leading up to May 1st in my hypothetical example. And then after the live event on May 1st, presumably you're selling something, so for about a week or two after it, you're then selling something. And for about a week after that, you should consider a downsell or some sort of like surveying thing, right.

So as you can see, it's a lot more than just randomly announcing an event, which is what I used to do and just be like, good news, next Wednesday, webinar. Good news, next Wednesday, live Instagram thing. Not every single thing you do in your business has to be this way, but what we're going to talk about today is kind of dotting a couple of these big, big things, these big ticket items throughout your year.

And if you do that, you really do have to follow this kind of plan, reverse engineer, and really come up with this kind of all out assault marketing plan. You don't want to be in reaction mode. You want to be in planning mode. You want to kind of expect the unexpected as well, but at least because you're not running around like crazy, you will be willing and able to take it on, right.

The other thing I want you to consider is that you don't want to stack too much stuff in any one quarter throughout your year as we start talking about this stuff. So as you start planning and as you sit down with the document, the guide that I'm going to give you below, you want to make sure that things are spread out somewhat evenly, right.

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So I never personally don't - I don't do more than one promotion for my own business or my own product, specially the same product in the same corridor. If I had lots of different products or services or something, maybe I would do like one for one service and one for a product or something like that. You could kind of split it up that way.

But in general, I like to think of one big thing per quarter. It's a nice space. It allows you to really get things done. It also really allows you to nurture people in between these times which is why I think is really forgotten about.

We often think about these big sales and we think about all the sales stuff, but we don't often think about what are we doing in the two months, three months, six months between the sales, between the promotions, between the webinars. We have to be nurturing the crud out of them, right. We want to really be helpful during this time. We want to be working on educating our audience, connecting with them, creating that like no one trust factor, right.

At the same time, with what we're going to talk about in terms of planning out your year, we don't also want to be too committed to a plan because I've also seen how stuff changes, right. So I mean this year and I shared about this a little bit on last week's episode. But like this week or this year, if I had had everything planned out, and I did have a lot of things planned out but then my dad passed away. And it was really fast and it was a lot naive.

I was like very naive about how long and hard it would be after and how little energy I would have. Like goodness, shout out to

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anybody going through grief. I just never - I never understood, obviously, until I went through it and I don't imagine most people can, just how much energy it takes out of you. I feel like a completely different person and feel like somebody who I can normally get an insane amount things done in a very quick time period. And that just doesn't feel true anymore.

So we don't know what's going to come up for our year. You might be going through that now, right. And that's something that you should consider as you're planning out your year. Candidly, it was something I took into consideration a lot for planning 2023 was like a lot of let's paste this out, let's not put too much on my plate, what else can we do that doesn't always require me, this kind of stuff.

So it's important because I'm just being realistic about where my energy is and I can always amp it up. It's just a lot harder to ramp it down, I think, in my opinion. So here's generally how I go through planning my year. And this was the first year I actually did this with my team.

So this year a lot of the credit goes to them because they came to me kind of with a plan. So this year was really cool and the reason I want to share this with you is because last year, I shared my own planning method and how I did it by myself in episode 22 of the podcast.

So if you're like, wait, I want to hear about how you just did it when you're on your own and all that kind of stuff, I think episode 22 is worth it listen. But don't discount this episode if you don't have a team yet, because there's a lot about what I learned from my team that I should have been doing even when it

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just was me. So I'll kind of put aside the way that I used to do this by myself so that I can talk you through how I'm doing it now. And hopefully this is helpful for you to see the evolution since now you could go back and listen to how I did this a year ago.

So this year, it was really cool because, well, first of all we went on a little business retreat and we did our planning together and it was so fun, and they brought all the Trader Joe snacks which was really fun. And Lindsey, my operations manager, she started out by giving us a revenue forecast and then a budget based on that forecast.

And like I said, this is something I totally should have done for myself, right. This was not something I did. All I ever thought about was the marketing stuff. You're probably not surprised finding out that I love marketing, as you know, and I could plan marketing all day long. I would love to plan the marketing for your business. I would be so excited and thrilled and honored.

But I didn't ever sit down to think about, okay, how much money do I project that I actually will make. It's a little easier to do once you get some business years under your belt and you start to understand kind of what's expected and what's normal, but then also like the budgeting based on that.

So that was the first thing we did, which was really cool because we sat down. We were like, okay, here's the projected revenue for the year, kind of monthly averages, quarterly average, all this kind of stuff. Based on that, here's about what the budget should be and we broke it down to operations

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budget, and marketing budget, and all that kind of. We talked about where we want to allocate funds to ads, and to team, and to all of that kind of stuff, right.

Then it's really helpful because from there you can say okay, if I think my revenue is going to be about this, and I think my costs are going to be about this, then I need to - in law school, they always said like they used to call everything widgets so they would always say like I would need to sell 20 widgets, right. So let's just pretend that we all sell widgets.

So you would be able to reverse engineer and say okay, if I project to make \$20,000 and I expect my expenses to - a month, and my expects my expenses are like \$10,000 a month, that's reliant on X number of widgets being sold. Now, we can put the marketing plan into place to say how am I marketing my services or my products in a way that supports selling that many widgets, right.

And even from there, I've reversed engineered it even more to say, okay, if I need to sell 20 widgets a month, I had a conversion rate of, let's say, conservatively three percent. Meaning only three percent of the people who are on your email list or who signed up for your webinar convert when you run a sale or promotion. Then how many people do we need?

I should have brought Ryan on the podcast this week so we could do real time math because I, you're lucky I can add. And I'm not even sure if I can do that. But so let's just say like if you had to convert a three percent conversion rate, which is pretty conservative but really - well, for some people it's like one or two percent by the way, so you really need to know what is

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normal for you. You can look back, you could also look at industry standard, you can also go with something conservative. If you think only two percent of your your list, let's say you run an email promotion, only two percent of your list is going to convert, then how many people do you need to go through that thing in order for that to sell that money, that many widgets, right.

I think we often think about, and I used to do this, I would just be I want to or need to sell 20 bundles a month, 50 Ultimate Bundles a month, something like this, right. And I would just think about it as like 50 was my goal, but really, it's deeper than that. What then has to happen is if the webinar is my main driver, I need to get X number of people to sign up to convert at three percent to sell 50 Bundles.

So it's not just like setting a goal for yourself of like I want five private coaching clients a month or I want to sell five courses a month. It's how many people do you have to run through that promotion or to convert at like somewhere between two to three to four, five percent to get to that many core sales or client sales or whatever, right.

So I want you to kind of work through it and go a little deeper. And that's really helpful then to using that information, using that data to kind of spread things out over the year, because then you see, okay, I got to sell 20 widgets, but I probably will only sell five widgets or ten widgets every time I run a promotion, then I need to have X number of promotions a year. It makes sense to have one maybe in January, February. It makes sense to have another in September. And so boom, there you go. You got your first two big dots on your calendar, right.

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So that's why I like to kind of put bookmarks, like big, big bookmarks on the major things. Once I start doing some of this work, some of the more technical stuff, the data-driven, financial-driven stuff, then I start to dot those onto the calendar of okay, that means I probably have to have about three promotions, I'm going to do three sprints, whatever they are for you. This can be a live launch. This could just be a period where you focus on it. It can be open closed cart, anything you want, right.

You're going to dot those throughout your year, whatever time period makes sense for you. Then you're going to reverse engineer to all of those time periods like you're going to back out a couple of weeks, and you're going to add a couple weeks on the back end to do sales and to do follow up or even a downsell.

And there you go, when you look at your calendar, it's pretty wild. We did this for this year, we picked out all our months, and the quarters that we're going to be doing these things. And once you start doing that, things fill in fast. They're really, really fast.

And then you look at your calendar and you're like, okay, well now there's only two months. Once you add in all the weeks of nurturing, the weeks of follow up, and the weeks of serving after maybe a week of a downsell right, there's maybe only a month or two before you're going to start warming them up from the next thing.

So then what I do is I look at those periods in between as merger periods and I think about what I'm going to focus on in

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terms of nurturing and marketing to my audience. So what would make sense is to focus on something and start nurturing them for something that you're going to sell the next time around, right. Start warming them up, getting them familiar, talking about some of the concepts that are in your course or whatever, and warming them up to the idea that something else is going to come down the line.

What will be interesting is if you go back and listen to episode 22 from last year, it'll be really interesting to hear me talk about how I approach this quite differently in terms of like I would approach this more in terms of goals and what events I wanted to accomplish. And I think that stuff is all really important, but I do think that getting some of this solid business plan part down first to say this is what I'm going to do.

Even if it's something you're working on. Like let's say you're sitting down to do your 2023 plan and you're saying I want to come out with a new course. Well, it's already December, it's going to be difficult to come out with that really, really quickly. So maybe you come out with this new course in September. Like that's like your full live launch in September. You beta test it a little over the summer, you warm people up, you spend the summer nurturing them, all that kind of stuff, right.

So at least it even gets you into the idea of when are you starting to work on things. That's something else that I always do with my annual planning is that I sit down and I do this kind of what I would call like the outward marketing plan. So these things that go on the list that you can see. Like you see when

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we have promos and you see all that. But what am I doing internally during those months and all the other months? So a lot of times when you see us running a promo, I'm behind the scenes working on the next thing because I've done that promo, like work months and months in advance, right.

So when I do my planning and you'll kind of see this in the annual planning guide that you can download for free in the show notes, you'll see that I focus on what's going out and what am I working on in, right. So I would encourage you to think about both of those things.

I would also encourage you to think about what like behind the scenes, like processes, admin, any of that kind of stuff, what can you start outsourcing? What do you want to have as a goal to get to? Do you want to hire a VA this year? Do you want to spend fewer hours sending out contracts and collecting invoices and all that kind of stuff, right.

You can start to put that down to as to like the plan is for you to get a solid, like Asana system in place like I did. And I'll give you my, like I think it's a free trial link below. I took - I've talked about this a million times but I took Louise Henry's Up Level with Asana course, which is like the best course I ever took and I'll link to that below as well, and I have I think a huge coupon for you. I think \$500 off.

So I took that and I absolutely loved it because that's what helped me to get like my internal systems down. And then that year, I was able to start hiring. Little hiring at first, right. Like contract contractors, couple hours a week to then a couple hours, more to more and more and more and more people, and all

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that kind of stuff, but that's really what allowed me to get that in place.

So that year on my To Do List, like my internal kind of behind the scenes To Do List was to get that system in place. I had to get some of my own stuff in place too, so it can't - your annual pain can't always just be marketing stuff as much as I want to do that all the time.

It also has to be like what else are we working on? Are we doing a rebrand? Are we going to do a website? Do we have to - like do we want to add a new content channel, like a podcast this year? When is that projected to come out? How much in advance do you want to start planning for that? Getting it edited, getting all the artwork done. Yeah, consenting that out, all of that kind of stuff. It's a lot. So all of these things, whatever it is that you would be planning, it takes a lot of reverse engineering.

I think something else that can come up for you as you're doing some of this annual planning is that you might start to see holes in your business as to where you need support. So you might start seeing like how am I ever going to get all the copy done for all these projects? Because on the outside I have this marketing projects like live webinar going on and internally, I'm working on a new website. And I can't do the copy for that and the website and everything else in my business at the same time.

So I know for me when I started doing this planning this way, it did start to make it very clear where I needed more support. And even if I couldn't afford it at that very time when I started doing this, it at least gave me an idea as to what kind of

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support I was working towards. And, the harder I worked and the more I kept my head down, those opportunities then became available and it felt like a stretch. Like the first time I hired a copywriter, I remember I was terrified and I thought I was like losing all my businesses money and this was like so scary to me. And it turned out to be such a great decision, because first of all, they wrote such better copy than I could for a sale. But also, it freed me up to do more of what I needed to do, right.

So this kind of planning will allow you to see more where these holes are, where you can use support, what do you have to do, what do you not have to do, what do you not like doing. All that kind of stuff will become more and more clear to you. So that's generally how I go through the year.

I kind of dot these big, big events on the calendar. I reverse engineer a little bit of like I back out how much lead time there's going to be. I also then think about how much lead time I need if I am going to hire a contractor. Like copywriters, you got to hire months and months in advance. So getting that kind of stuff in place, dotting this all out on the calendar. What are going to be your sprints? What are you going to focus on during those sprints?

This is how I like to do it. It's worked really, really well. Honestly, my Sprint times, my promos and all that kind of stuff aren't not very stressful. Of course, we have our little bleeps where links don't work or something like that, but we do not work like crazy. It's not a hectic, everybody running around with their hair on fire situation over here. It's pretty chill. So, and that's the way I want it.

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The only other thing I want to encourage you to do is that I really strongly believe that your personal focuses and your personal goals have to be part of this planning process. I would love for you to see how your business could support your personal goals or what you need to make happen in your business in order for your business to help you achieve more of your personal goals.

Like if you want to have a consistent morning routine or you want to move your body more or you want to travel more or like whatever, you want to go therapy, or - I remember when I started my business, it was like if I could go to therapy every week and get a massage. And I remember when I started, I was like if I could get a massage once a month. And then maybe a year or two in, it was like if I could get a massage every other week, that would be the most luxurious thing in the whole world, right.

Now, it's like I want a massage every Friday. I love getting - I get a massage every Friday afternoon. I absolutely love it, helps me to unwind. I also had brain surgery so like my neck is tight but you should get a massage no matter what, but that was important to me. And you better believe it, that that stuff supports your business, right.

Are we building lifestyle businesses? No, not necessarily, but your business can help support your lifestyle, right. I think your business can help you take care of yourself. And I wish that people often - so I was listening to something the other day and somebody was talking about how much they've been exercising consistently, gentle movement that feels really good and leaves them with more energy. And they were like I should

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probably be working on my business during those times but you know what, I just got to take care of me. And I was like you are working on your business during those times. Please don't get it confused that because you're not sitting at a computer or you're not on Instagram, you're not doing something for your business.

First of all, I get so many ideas, I get so much content inspiration from going out and actually doing other stuff. Half the time I'm in a massage, I dream up some new funnel or some new marketing idea, right. And having that time and doing whatever it is that means to you, maybe you love going surfing or you love gardening, that time is what's going to make you the more effective entrepreneur that you are, right.

So I would love for us to stop seeing it as separate time, like this is time away from my business. In fact, I actually think that time does support your business and not everything has to be related to your business. I'm just saying like it does support your business. So I would love for you not to beat yourself up about those things. And I'd love for you to see them as actually helping you to support your goals, right.

To that effect, one thing I did this year that I thought was really cool was that I came up with daily non-negotiables. So I had a little list of daily non-negotiables and I had a list of weekly non-negotiables. And I actually put those all into Asana and set them as recurring daily or weekly task for myself.

So, I mean my daily negotiables were basic. Like you might laugh at me because I'm sure you're doing this already, I hope. Bbut for me, they were really really basic because I was still at the beginning of this year, I was still taking care of my dad. I was

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so worried about him having cancer and all this kind of stuff. And so my daily tasks were like drink water, 15 minutes of movement and sunlight, right. It was really, really simple. Take my multivitamin, take my probiotic. And then like weekly task was like do a little financial health report, just look at my stuff and kind of like check in. I think it's super helpful. It kind of desensitizes this anxiety over looking at money. I would do that. I would get my massage, of course, that kind of stuff. I'd clean my office.

Those are my little daily or weekly non-negotiables that I built into my business plan for the year. And it really really helped me. I feel like a much different CEO this year. And this is a year that crushed me personally, right, with losing my dad. And I still feel like a way better entrepreneur CEO this year than I have been before. And that's the goal that we get better over time.

I'm so curious to hear your thoughts on this episode and what's helpful, and especially once you go download my free yearly planning guide in the show notes below. I hope that you like it. I hope it's helpful for you planning your year this year and every year after this year. I also hope you have a wonderful holiday season.

I will still have episodes during the holidays, but just in case you're not listening, I wanted to say that I hope you have a wonderful holiday. I am going to take the end of December off. And then in January, I'm going to Spain. I'm really excited. And then we have something super exciting coming for you at the end of January so you have that coming up for you.

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**How to Plan Your Business Year [free guide!]**

Hopefully, you've also been liking my new Thursday episodes of On Your Terms. I'm doing a little mini episode every Thursday now on On Your Terms where I answer someone legal question. I do a little quick Q&A. All the episodes are under 10 minutes and I call it Sam's Sidebar. So I hope you'll listen. I hope you send it to a friend.

I'll make sure I include those links down below for you for Asana. That was and still is so helpful. It's where I live every day, all day. And for Louise's Up Level with Asana course because I absolutely loved it and I loved Louise, she's great.

And make sure you get your free planning guide down below using the link. You can also share that link with your friends if they need their yearly planning guide for their business too. With that, I still appreciate you listening and I'll chat with you next week.

Thanks so much for listening to the On Your Terms podcast. Make sure to follow on Apple Podcast, Spotify, or wherever you like to listen to podcasts. You can also check out all of our podcast episodes, show notes, links and more at [Samvanderwielen.com/podcast](https://samvanderwielen.com/podcast).

You can learn more about legally protecting your business and take my free legal workshop, Five Steps To Legally Protect and Grow Your Online Business at [Samvanderwielen.com](https://samvanderwielen.com). And to stay connected and follow along, follow me on Instagram at Sam Vander Wielen and send me a DM to say hi.

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