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## PODCAST TRANSCRIPT

### Episode 016, with Lor Bradley

#### 7 Easy Steps To Get Prepared For 2022!

#### Introduction

Welcome to the scale and skyrocket podcast and this week you're with me Lor Bradley and I'm going to take you through my seven steps to your best year ahead in business. This is a special deep dive training episode so do download the step-by-step cheat sheet that accompanies this episode.

So, if you're a time-smart entrepreneur and anything like me, you'll already be turning your thoughts to next year and the things you want to achieve for your customers and in your business. And if you haven't, and you want to avoid the 11<sup>th</sup> hour panic of wondering what on earth you're going to be doing come January, then stick with me and I'll break everything down for you over the next twenty minutes.

I can't believe 2022 is almost upon us – I mean where has it gone? We were in 2020 like 5 minutes ago, right? I was just reflecting this afternoon that I've struggled with my speaking voice for almost 6 months now! It's had a huge impact on how well I've felt this year has gone for me. I do lose it if I speak for too long so let's see how we get on today, so please bear with me if I squeak a bit at times!

Alright, so let's get right into the episode.

Now as I like to work smarter and not harder, you can use my simple process for checking in on how your business is doing at any time during the year, or at the end of the month and not just at the end of the year.

In my own business, holding annual and monthly reviews has helped me to not just to plan ahead but it's helped me to push myself forward and push my business into new growth, new opportunities and improve how it operates.

So just like we all like to reflect on how things are going in our lives, it's also really important to commit that same reflection time for your business, for your teams and your customers. And the reason it's so good to do this is because you can take stock of what's happening around you and make changes proactively so that you improve month-on-month, and year-on-year.

Here's what you're going to do to get started. You'll want to set some a couple of hours aside and during this time you're going to review the progress you've made so far. Once you get into the habit of reviewing how things are going in your business, then this exercise really won't take as long. I can usually do it in thirty minutes tops. And like I said, I do this every month and you can nail this in thirty minutes too.



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OK, so here's what you're going to do. You're going to look back so you can leap ahead in your business. You're also going to check in on your goals and on what you'd like to achieve in your business going forward.

And then, you'll prioritise and build a forward plan of the things you want to continue to build on, OR, get you back on track if things haven't been going so well.

Either way, if you follow my steps, you're going to get yourself on track for your best year ahead, or your best month ahead if you're using my method as a regular check-in!

And you might be thinking how do I do this? What tools do I use to plan my business? Well, the honest answer is you can use anything! You can use sheets of paper, napkins, online project management tools like ClickUp, or you can journal your thoughts.

The how really doesn't matter, the more important thing is that you capture your thoughts in a way that plays to your strengths and you're saving them somewhere where you can go back to them later on.

### **Step ONE: Your Wins and Successes**

I want you to take some time now to think about your wins and your successes. I want you to write down all your successes, your breakthroughs, your achievements and all those happy moments you've had over the last twelve months.

They don't have to be business related wins as some of our biggest learnings can come from other parts of our lives.

And I also want you to save all your client testimonials and shout outs into one place. If you haven't collected testimonials for a while, now is a good time to do that. I copy mine into a spreadsheet and I also keep screen clippings in a folder so I can use them on my website.

### So, Why Do We Capture Our Wins?

You're going to do this because it's important to recognise and celebrate your successes, even if you've had a tough time. If you've had a tough time, then if you can get yourself into the habit of recognising successes (even those little ones) then it will help you to build a more positive mindset.

And I get it right, sometimes it's easier to fall into focusing on what's not working. So, by capturing your wins, you'll also be able to re-frame your challenging times and put them into perspective alongside all the good things that have happened.

So, if you have a team, get them involved in calling out their successes. And do this together. Share your wins with them and make this an opportunity to celebrate and share gratitude together for the good things.



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Then I want you to think about each of these good things that have happened and ask yourself if you can see any common themes between your wins.

And a great example is, you might be seeing lots of positive feedback themes from your clients on your packaging, your customer service, or your super slick delivery times.

The reason you're looking for common themes is because you're looking for untapped strengths in your business. When you see a strength then it's important to recognise it, capitalise on it and even include it as part of your operational workflow and bake it into your brand identity.

OK, if you aren't spotting any common themes, then think instead about what's helped you to achieve success in those individual wins.

So, write all those wins down and then set the intention to further strengthen those things in your business. For example, if you've had great feedback from a client that your checkout process was stress free then that's a great place to start looking at improving the rest of your sales process.

OK, I want you now to call this list "The Things I Need to CONTINUE"

### **STEP TWO: What's Worked Well.**

And here you'll want to take an in-depth look at your business, starting with your end-to-end journey. This journey starts at how you generate your leads right through to taking your clients through your checkout, onboarding them and then looking at how you nurture them afterwards.

Now, I'm a visual thinker so I like to draw out the journey through my own business on a whiteboard because it helps me to visualise it so you might find doing that helpful.

Ok. I also want you to think about all the business process and tools you have that supports that end-to-end journey and write down where they have worked well for you.

So, just a couple of tips here. You want to get as detailed as you can when you make your list. For example, if your social media outreach is attracting a lot of new followers then really dig deep into why that is. And lastly in this step, I want you to include yourself in this process. How are you working well?

And the reasons you are doing all these things in this step is because these are the things you'll want to continue doing in your business. So, don't stop doing these things if they are working, it's a really smart move to recognise what's working well and continue to do it consistently!



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Now I want you to add all these things you've captured into a list and call it "The things I Need to CONTINUE".

### **STEP THREE: What Could Have Been Better?**

Alrighty, so next I want you to focus on What could have been better. So, in this step I want you to take some time to reflect on what's not worked so well during the last year, or the last month or quarter if you are doing this exercise more regularly.

Ask yourself questions like: Are there things I am doing that are slowing me down? Am I feeling frustrated with any parts of my business? Am I getting in my own way?

So perhaps you've received feedback that a client really loved your service, but they thought it was difficult to make a payment. So, its feedback like this that you want to capture.

And I'm just going to say here that it's REALLY important when you are looking at the negatives to frame this positively in your mind and set your mind to thinking about what you CAN do to change or improve upon the 'thing' that's not working for you.

OK. If you've just come through a tough period in your business then this IS going to be challenging, so if you're emotionally struggling with this part then break this into bitesize chunks and take breaks. You could even give yourself a reward afterward! Don't be afraid to put down this step and come back to it if you need to.

And again, don't forget to include yourself in this process. How could you have performed better? So, you might want to think about the places where you've struggled.

Think about the things that might be tripping you up; your routines, balancing your time, perhaps you've not committed enough time to YOU and you felt that ripple through your business.

Be kind to yourself whilst you think about these things and remember, you're calling these out order to make life and your business even better.

So, I want you to list all those things out. And the reason you are doing this is because these are the things you'll need to either bring to a complete stop, or perhaps start doing something completely new instead. So, don't be afraid to stop doing things if they aren't working or if they just don't work for your business.

I've worked with clients who've said, "I don't know why we do it this way, we've always done it that way because our competitor does that."

So, my point here is to reflect on the WHAT and the WHY and then DO what works for YOUR business.



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And it's a smart move to recognise what's not working so well and either bring those things to a stop, or work out what you need to do instead of the thing that's not working.

So, I want you to add all these things under a new list called the "Things I Need to STOP, or START Doing"

### **STEP FOUR: What you need to start doing**

So, exactly the same as the previous steps, I want you to take time to think about the things that you need to DO, or the new things you need to start doing that isn't already in your plan for your business.

So, perhaps for example, you need to refresh your branding or re-focus on your social media strategy.

Alright, now this part might trip you up. It can be SO easy to get distracted by new ideas, and shiny new things. So, remember, it can be really easy to focus the things you WANT to do versus the things you actually NEED to do.

You've got to think smart here and focus on the things that are going to benefit, grow and scale your business.

If you have trouble with prioritising, then I'm going to touch on that a little later as I have a simple free tool that will help you choose which activities are right for you to add to your 'start' list.

And finally, as with the other steps, don't forget to include yourself and your team in this process!

So, list all those things out. And the reason you are listing them is because, these are the new things that might need to make time for in your business plan going forward.

Alright, I want you to add these things under the list called the "Things I Need to START"

Ok, we are almost there so let's move on.

So, when I reach this stage, I usually have a pretty good grasp of the things I need to stop, start or continue in my business. I'm usually able to see where I need to focus in so I can propel my business forwards.

### **STEP FIVE: Set Yourself Goals**

And what you're going to do now is set yourself some goals and I recommend setting goals that focus you on your next six months ahead. You don't really want to set goals that stretch further than six months as the secret here is to focus on what's happening right now and having a strong start to your year ahead.



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Now, I always recommend setting three simple goals; no more than this as you want to work smart and not overwhelm yourself!

I'm not going to talk about how to set goals but if setting goals is new to you, or you need a refresher on how to do that, then I have a great video that you can watch. I'll leave the link to that for you.

### **STEP SIX: Prioritising Your Lists**

OK. So, by this stage of your check-in, you'll have created lots of lists of things to start, stop and continue. Hopefully your lists aren't too long!

What you need to turn your attentions to now is prioritising your lists of activities into brand new lists using my free prioritisation tool, so I'll leave a link for you to get that.

My really simple prioritisation tool is going to help you set priorities based on the goals you set for your business in the last step.

So, what I want you to do right now is create three new lists and call them '*Do This First*', '*Do This Second*' and '*Do When Time*'. And then with my prioritisation tool, pass each task through the decision flow and this will give you a priority for that task.

Next, write the task on the appropriate new list. So, for example, if your website refresh comes out as a 'do first' then add that to your Do first list. And voila, what you'll end up with is three prioritised lists.

What I find really helpful is to keep a marker of the stop, start or continue against each activity as this will be important when you come to consider these when you create your plan.

### **STEP SEVEN: Plan For Success!**

And we are at the last step! You're now ready to start creating a plan of action. If you already work to a time plan for your business, you'll now need to diarise your new prioritised activities. If you haven't yet created a time plan, then now is the perfect time to create one! I like to work in ninety-day cycles but in the essence of time I'm not going to go into that here.

So, I have a few tips to leave you with for when you create or update your time plan.

Your plan can be created in any format such as a list, a Trello board, on a calendar, on a whiteboard or even on a piece of paper. What's most important is that you HAVE a plan of action!

Try not to overcommit yourself to doing too much too soon. Remember to keep your plan actionable, do-able and achievable so spread things out and focus on your priorities.



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And don't forget to plan into your diary moments to reward yourself and celebrate with your team members if you have them.

And lastly, when you're building your time plan for the next six to twelve months ahead really think about what you want your working time to look like as remember, you are the boss of your business, and you are building a business to suit you - and not the other way around!

Until next time,  
Lor Bradley