

Program Options for Taking Stock Retreat

Option A: What's Working / Not Working

Notice and Describe

- Prepare two lists – What's working. What's not working.
 - Think for a moment about your work and personal life. Imagine your life as if in a movie, with a montage following you for a day or week – at work, at home, doing errands, self-care, your family and friends. Think about your clients, and what tasks you do at work – the projects/services you've been doing lately. Imagine your home and your rhythms there, the environment/ethos of the place, chores, schedule, family, family needs. Your self-care habits. Friendships, social life. (Optional: review your calendar or to-do lists to prompt your memory.)
 - Fill out the lists – either one at a time, or both at once. What is working – what do I like? Feel good about? What is not working? – Anything that feels difficult, or takes extra energy – even things you like at the moment, but later don't like. Consider setting a timer for 40 – 60 minutes. Keep writing, don't stop. The more your hand moves, the more ideas that will flow. Put down big ideas and middle ideas and little ones too. Truly, even the smallest things – like, "I can never find a paperclip when I need one."

Now, take a break

Go back to the list, anything else to add?

Make some observations

- What are your initial reactions? What jumps out?
- Which list is longer?
- Count some things – find some numbers.
- Do you notice any patterns?
- How long have some of these been true?

Reflect

- What am I surprised about?
- What emotions do I feel? What am I proud of? What is irritating?
- Which things feel important? (No matter how small or little.)

Strategize

- Look at the What's Not Working List – what are 3-5 things you'd like to change? What is involved in the change – is it saying No, outsourcing a chore, adjusting a schedule?
- Look at the What's Working List – which practices and policies need to stay in place to support these? What do you want more of?
- What new desires are popping up? Pick 1 or 2. What's the first step to making these happen?
- Now, look at the lists from the last 3 questions. Choose 1 – 3 changes you plan to make. What are the first actions?
- How will you feel after you've done this work? What are the results you hope for?
- Take any steps now that you can. And, put time on your calendar to complete this work.

Option B: Past/Present/Future

Notice and Describe

- Think about the **past** season. Write or draw all the things you've been doing - events, projects, clients served, business chores. Your schedule, self-care. Everything.
 - Reflect: How did you feel? What are you proud of? What was difficult? Look for a word or two to describe this chapter of life.
- **Present** moment. Try to tune into where you are today. Right now. Scan your body. What's going on with it? How are your emotions? What do you long for? Desire? Where does your mind want to go?
 - How do you describe yourself today?
 - If you like, start to extend to the last week or month. What is your schedule, who do you mostly spend time with, how would you describe this chapter of life. The present is often the most challenging, try to stick with it to really feel and experience where you are right now in life.
- **Future.** What do you wish for the next season? What is required to happen? What do you want to add? What do you want to take out of your life/work? What are your top priorities? How would you like to picture yourself __ months from now? What do you need to make this happen?

Reflect and Strategize

- Summarize your recent past – how would you explain it to someone in a few sentences? What theme pops up. How did you generally feel about it?
- Summarize where you are now – in the same way as above.
- What do you want next in life? What do you want the next chapter to be like? Is there a theme?
- Get more detailed - What are some things you want to cut? What do you want to add? Any new desires popping up?
- Pick 2 – 5 actions. What's the first step to making these happen?
- How will you feel after you've made these changes? What are the results you hope for?
- Take any steps now that you can. And, put time on your calendar to complete this work.

Option C – Business Check-In or “CEO Retreat”

Prepare

- Collect items to help you review your business: calendar, emails, bookkeeping/bank statements, business tools you use, etc.

Review Business Areas

- First, simply look over and describe some or all the following areas. Note, it's important to write or draw out what seems obvious. This does two excellent things for the brain and intuition. It warms them up for thinking more in this area. And, when all the information is in front of you, the brain doesn't have to hold it, so it frees up space for more insights and “aha”s.
Pro-Tip: work on one very large piece of paper, white board, or separate pages ... so you can lay out all of your thoughts in front of you.
 - **Primary Work**
 - Services/Products – list or draw out your current offerings, including prices
 - Clients/Buyers – list out current ones, perhaps putting into categories
 - **Numbers**

- For the last 3/6/12 months – fill out a chart. Make three columns: Sales, Expenses, Profit (Sales – Expense). Optional – add a fourth column for Taxes.
- If you don't have the precise information, make estimates.
- **Marketing**
 - What does your passive marketing include? – Digital presence: website, Instagram, email signature, etc. Reputation – what people say about you.
 - What are you doing actively? – Advertisements, flyers, e-newsletter, networking.
- **Taxes and Legal**
 - Do you know all of your responsibilities and due dates?
 - What are your supports/resources?
 - How much time does this take?
 - How much does this cost?
- **Nitty Gritty**
 - Review your business materials – invoices, contracts, templates for proposals, new client materials.
 - Review any policies that you have.
 - Think about physical systems – desk, shelves, files, printer, computer, etc.
- **Self-Management**
 - Write/draw out your current weekly schedule.
 - What are your current self-care habits?
 - Do you have friends/peers to connect with?
 - Are there areas of interest you'd like to pursue? New skills to add?
 - Are you making enough money?
 - How happy are you at work?

Reflect / Analyze

- Go through each area, make some observations and form opinions.
 - **Primary Work**
 - Services/Products – are there any adjustments you'd like to make?
 - Clients/Buyers – go through each one. Rank them on how good of a match they are – that is, how easy/fun/rewarding is it to work with them? Choose a shorthand for this. Remember, this is about fit. Examples: Perfect Fit, Good Fit, Okay Fit, Not Working. Or, A+, A, B+, B...etc.
 - **Numbers**
 - Sales, Expenses, Profit (Taxes) – are these numbers what you'd expect?
 - Are you earning enough profit for your paycheck needs?
 - **Marketing**
 - Passive marketing – Are you happy with what exists? Anything you'd like to add or change?
 - Active marketing – Are these working? Any that you want to cancel or add?
 - **Taxes and Legal**
 - How do you feel about your current system, if you have one?
 - Is there anything you need to know more about? Are there tasks you'd like to offload?
 - **Nitty Gritty**
 - Business materials – are you happy with these? Want any changes? Need to add any more?
 - Policies – any that need adjustments?
 - Physical systems – are they working? Not working? Need any changes or help?
 - **Self-Management**

- Weekly schedule – need any adjustments?
- Self-care habits – any changes needed?
- Friends/peers – anybody you'd like to know more? Or opportunities for more collaboration or co-working?
- New interest/skills – how can you start working on these? Be sure to do it during your work hours.
- Money – if you are earning extra, what would you like to invest it in? If not enough, how can you adjust prices or projects?
- Happy at work – if yes, what is working? If no, why not? What can be changed?

Strategize

- Look over the list, and write out 5 changes that you can make (in any of the areas).
- Commit to making 1 – 3 adjustments, starting today.
- If you can make the changes immediately, then do so. For example, you can adjust pricing on your website and contracts.
- If it'll take more time, for example, re-writing a webpage, then create work times on your calendar. Optional, arrange for help.

Closing out the Work

- What are the results you hope for, from these changes? How do you want to feel afterwards?
- What are you most happy about / relieved that you figured out today?