

Fire Yourself First!

Creating a Dashboard to Track Success

Why Should you Track your Goals?

Everyone needs to know what winning looks like! Imagine going to a basketball game and there was no scoreboard! It would soon be very hard to know who was winning.

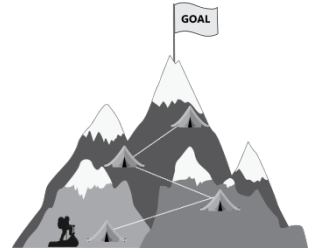
What Should you Track

1. What is your goal?
2. Why is that goal important?
3. What do you need to *DO* to reach that goal?
4. Create a *Dashboard* with 3 or 4 measurable activities that will get you there.

Where are you Going?

1. **Think 3 years out. Establish a goal.** (e.g. \$2m in new revenues, semi-retired)
2. **Plan your goals/targets for this year.** (e.g. \$1.1m new revenues, 100 new customers)
3. **What do you need to do in the next 90-days?** (e.g. hire 3 key people, create a webinar)
4. **What do you need to do in the next 30-days?** (e.g. notify current customers of new product offering, sales training)

HIGHER PURPOSE



Why Should You Track It?

Why is that goal important to you, your team & your customers?

TIP: Create a “trademarked” package that only you can offer! For example, you can create “Starter Package” that includes your product/service plus a free online training program on how to get started using it.

You should come up with 3 or 4 “customized” packages you can offer at your practice for your anti-aging program, weight loss program, or any other “program” you may offer.

Start Building the Plan

Rules:

- 1. *Clear & concise*
- 2. *Measurable*
- 3. *End Date*
- 4. *Who is going to do it*

*“I’m going to do **what**, by **when**”*

Write Down the Plan

	Specific Goals	Who (is going to do it)
3-year Goals	1. 2.	
1-year Goals	1. 2.	
90-day Goals	1. 2. 3.	
30-day Goals	1. 2. 3.	

Create the Dashboard to Track Results

“What gets measured, gets done”
~ W. Edwards Deming

Your dashboard is a weekly or monthly snapshot of your practice's goals. Can be financial, customer, or another indicator you want to track.

Don't overcomplicate the dashboard, try and repurpose existing data that you already have. It may be from your CRM, your CPA (bookkeeper) or created in: Excel, Google Sheets, Word, Google Pages.

Goals	Goal	Current	Variance
Upgrade 50 customers to the new "Second Level" package	50/m	20	-30
Reduce Expenses by 25%	25%	30%	+5%
# of 5-Star reviews per month	25	225	0
Past customer email mail campaign (# emails sent)	1,500	0	-1,500
