YOUR SUCCESS ACTION PLANNER

Take your business to the next leve!

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Yearly PLANNER

REFLECT ON THE YEAR THAT WAS.

TAKE A FEW MOMENTS TO LOOK BACK ON YOUR 2020

WHAT WERE OUR GREATEST ACHIEVEMENTS?

HOW CAN WE IMPROVE?

WHAT SHOULD WE DO MORE OF TO GET EVEN GREATER RESULTS?

WHAT DIDN'T WORK OUT SO GREAT?

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REFLECT ON THE YEAR THAT WAS.

TAKE A FEW MOMENTS TO LOOK BACK ON YOUR YEAR

TEAM ACCOMPLISHMENTS AND/OR ACHIEVEMENTS?

INDIVIDUAL ACCOMPLISHMENTS AND/OR ACHIEVEMENTS?

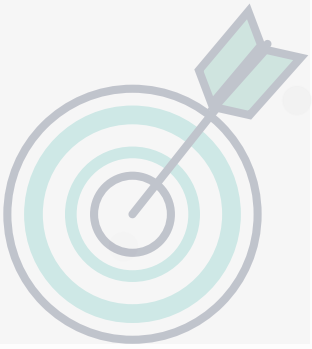
ACTION PLAN FOR ACHIEVING YOUR BEST YEAR EVER!

IF WE COULD HAVE OUR DREAM YEAR, WHAT WOULD IT LOOK LIKE?

HOW WOULD IT MAKE YOU FEEL?

REASONS WHY

GOALS



2021 VISION CAST

FAST FORWARD TO DECEMBER 2021-WHAT DO I WANT TO ACCOMPLISH BY THEN?

REVENUE GOALS

KPIs

MARKETING STRATEGIES

CULTURE

GROWTH PLANS

QUARTERLY PLANNER

Projects and action steps to achieve our yearly goals:

CORE VALUES

Top two action steps to get us there:

REVENUE GOALS

Top two action steps to get us there:

MARKETING STRATEGIES

Top two action steps to get us there:

HUMAN RESOURCES

Top two action steps to get us there:

GROWTH

Top two action steps to get me there:

WEEKLY ACTION PLAN:

BRAIN DUMP

Get it out of your system! Write down anything you want to accomplish this week

-
-
-
-
-
-
-
-
-
-

TOP 3 THINGS TO DO

Circle your MOST important goal you want to reach this week

1.

2.

3.

THINGS I WILL DO TO MAKE THIS WEEK GREAT

Weekly Goals

monday

tuesday

wednesday

thursday

friday

weekend

JANUARY 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	Start a team book club			1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
Notes:						

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January 2021

JANUARY 1-9

	Week 1	Week 2
SUN		3
MON		4
TUES		5
WED		6
THURS		7
FRI	1	8
SAT	2	9

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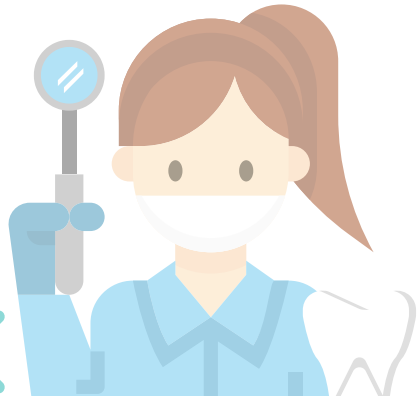
January 2021

JANUARY 10-23

	Week 3	Week 4
SUN	10	17
MON	11	18
TUES	12	19
WED	13	20
THURS	14	21
FRI	15	22
SAT	16	23



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Jan/Feb 2021

JAN 24- FEB 6

	Week 5	Week 6
SUN	24	31
MON	25	1
TUES	26	2
WED	27	3
THURS	28	4
FRI	29	5
SAT	30	6

FEBRUARY 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
				Spend some time getting to know one another by doing a behavioral assessment like DISC		

Notes:

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February 2021

FEBRUARY 7-20

	Week 6	Week 7
SUN	7	14
MON	8	15
TUES	9	16
WED	10	17
THURS	11	18
FRI	12	19
SAT	13	20

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Feb/Mar 2021

FEB 21- MAR 6

	Week 8	Week 9
SUN	21	28
MON	22	1
TUES	23	2
WED	24	3
THURS	25	4
FRI	26	5
SAT	27	6

MARCH 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31		Schedule a team meeting to review your new patient experience		

Notes:

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March 2021

MAR 7- MAR 20

	Week 10	Week 11
SUN	7	14
MON	8	15
TUES	9	16
WED	10	17
THURS	11	18
FRI	12	19
SAT	13	20

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Mar/Apr 2021

MAR 21- APR 3

	Week 12	Week 13
SUN	21	28
MON	22	29
TUES	23	30
WED	24	31
THURS	25	1
FRI	26	2
SAT	27	3

APRIL 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	Send out a job satisfaction form to get feedback to improve management, culture, and employee experience		1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Notes:

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April 2021

APRIL 4-17

	Week 12	Week 13
SUN	4	11
MON	5	12
TUES	6	13
WED	7	14
THURS	8	15
FRI	9	16
SAT	10	17

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Apr/May 2021

APR 18- MAY 1

	Week 14	Week 15
SUN	18	25
MON	19	26
TUES	20	27
WED	21	28
THURS	22	29
FRI	23	30
SAT	24	1

MAY 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	Before you hire someone, always conduct reference and background checks				1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	Notes:					

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May 2021

MAY 2-15

	Week 16	Week 17
SUN	2	9
MON	3	10
TUES	4	11
WED	5	12
THURS	6	13
FRI	7	14
SAT	8	15

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May 2021

MAY 16-29

	Week 18	Week 19
SUN	16	23
MON	17	24
TUES	18	25
WED	19	26
THURS	20	27
FRI	21	28
SAT	22	29

JUNE 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30			Don't forget to say 'Thank You' to your team and highlight something they did recently that you appreciate	THANK YOU

Notes:

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May/Jun 2021

MAY 30-JUNE 12

	Week 20	Week 21
SUN	30	6
MON	31	7
TUES	1	8
WED	2	9
THURS	3	10
FRI	4	11
SAT	5	12

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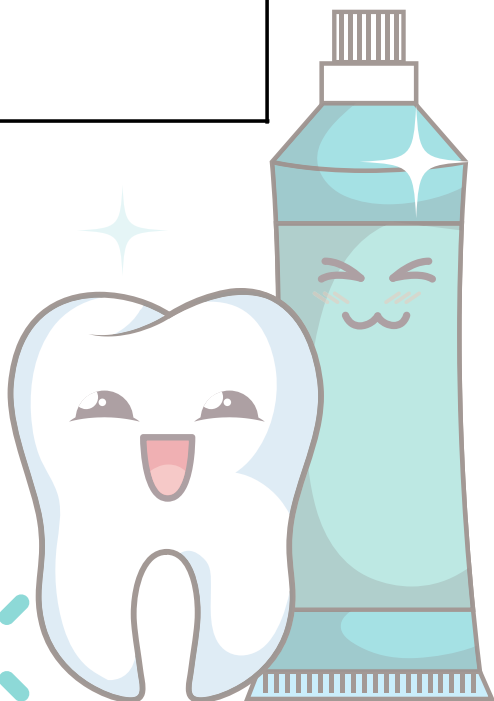
June 2021

JUNE 13-JUNE 26

	Week 22	Week 23
SUN	13	20
MON	14	21
TUES	15	22
WED	16	23
THURS	17	24
FRI	18	25
SAT	19	26



JULY 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	Schedule a lunch and learn to review your practices vision, mission, and core values		1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Notes:

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Jun/July 2021

JUNE 27-JULY 10

	Week 24	Week 25
SUN	27	4
MON	28	5
TUES	29	6
WED	30	7
THURS	1	8
FRI	2	9
SAT	3	10

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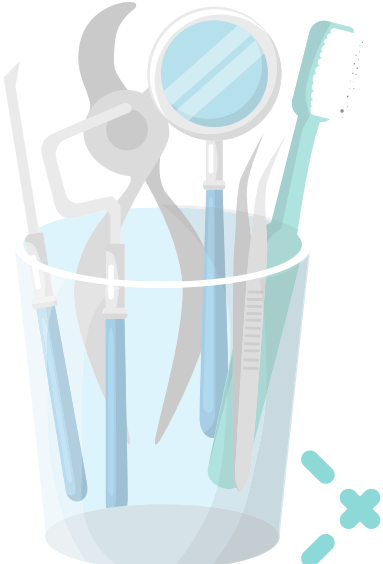
July 2021

JULY 11-JULY 24

	Week 26	Week 27
SUN	11	18
MON	12	19
TUES	13	20
WED	14	21
THURS	15	22
FRI	16	23
SAT	17	24



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Jul/Aug 2021

JULY 25-AUG 7

	Week 28	Week 29
SUN	25	1
MON	26	2
TUES	27	3
WED	28	4
THURS	29	5
FRI	30	6
SAT	31	7

AUGUST 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
		Schedule a 15 min goal-setting meeting with your team and then book a follow-up meeting 3 months after to check-in				1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	Notes:				

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August 2021

AUG 8-21

	Week 30	Week 31
SUN	8	15
MON	9	16
TUES	10	17
WED	11	18
THURS	12	19
FRI	13	20
SAT	14	21

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Aug/Sept 2021

AUG 22-SEPT 4

	Week 32	Week 33
SUN	22	29
MON	23	30
TUES	24	31
WED	25	1
THURS	26	2
FRI	27	3
SAT	28	4

SEPTEMBER 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	Schedule a team meeting to conduct a SWOT analysis of your practice to find areas of opportunity and growth	Strengths Weaknesses Opportunities Threats	

Notes:

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September 2021

SEPTEMBER 5-18

	Week 34	Week 35
SUN	5	12
MON	6	13
TUES	7	14
WED	8	15
THURS	9	16
FRI	10	17
SAT	11	18

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Sept/Oct 2021

SEPT 19-OCT 2

	Week 36	Week 37
SUN	19	26
MON	20	27
TUES	21	28
WED	22	29
THURS	23	30
FRI	24	1
SAT	25	2

OCTOBER 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	Keep proper documentation of personnel files			1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Notes:

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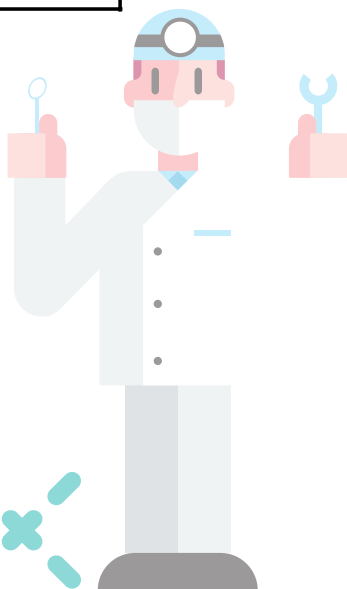
October 2021

OCTOBER 3-16

	Week 38	Week 39
SUN	3	10
MON	4	11
TUES	5	12
WED	6	13
THURS	7	14
FRI	8	15
SAT	9	16



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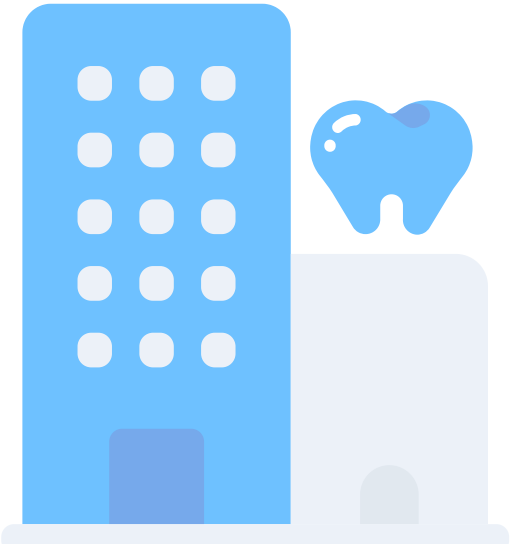
October 2021

OCTOBER 17-30

	Week 40	Week 41
SUN	17	24
MON	18	25
TUES	19	26
WED	20	27
THURS	21	28
FRI	22	29
SAT	23	30



NOVEMBER 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30				Make it a policy to document everything.	

Notes:

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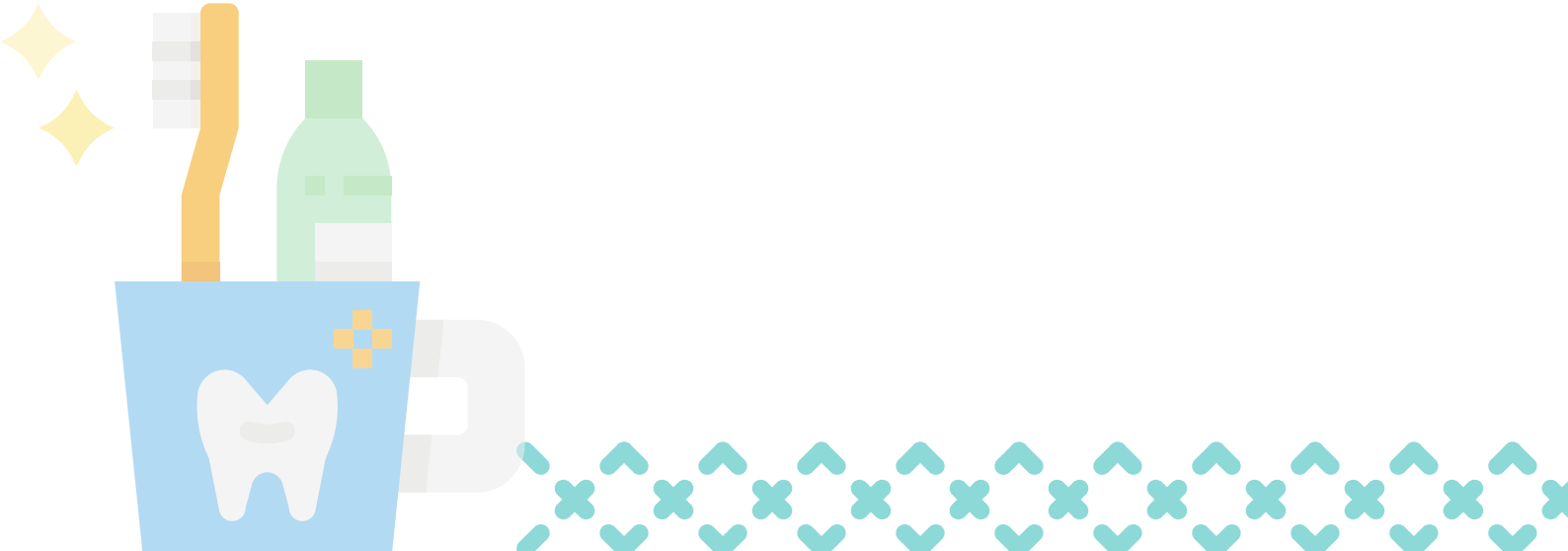
Oct/Nov 2021

OCT 31-NOV 13

	Week 42	Week 43
SUN	31	7
MON	1	8
TUES	2	9
WED	3	10
THURS	4	11
FRI	5	12
SAT	6	13



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November 2021

NOVEMBER 14-27

	Week 44	Week 45
SUN	14	21
MON	15	22
TUES	16	23
WED	17	24
THURS	18	25
FRI	19	26
SAT	20	27

DECEMBER 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	Hire candidates who are compatible with your business culture	

Notes:

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Nov/Dec 2021

NOV 28-DEC 11

	Week 46	Week 47
SUN	28	5
MON	29	6
TUES	30	7
WED	1	8
THURS	2	9
FRI	3	10
SAT	4	11

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December 2021

DECEMBER 12-25

	Week 48	Week 49
SUN	12	19
MON	13	20
TUES	14	21
WED	15	22
THURS	16	23
FRI	17	24
SAT	18	25

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December 2021

DECEMBER 26-31

	Week 50	Week 49
SUN	26	
MON	27	
TUES	28	
WED	29	
THURS	30	
FRI	31	
SAT		