

ANNUAL GOAL PLANNER



**CHUCK
BAUER** | **CSA**

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GOALS

READY, AIM, FIRE!

Recently, a major company that I train for announced plans for a sales contest that would run over the next six months. The consultants who qualified for the trip would, along with their spouse or guest, be treated to a **delightful five-day Caribbean cruise** on one of Royal Caribbean's top-of-the-line cruise ships. If that wasn't enough, **the company would be picking up the airfare and just maybe a few extra perks**. This is something that the consultants would not want to miss.

Imagine them, for a moment, as they picture in their minds **the highest degree of pampering**, food and more food, shows, sun, relaxation, reading, activities, movies, and ports of call with golfing and sailing! Beyond that, what about every water sport (bass fishin'?!) they could think of, not to mention spending time with friends and peers? Come on, they won't even have to turn down their bed sheets—the cruise ship staff will do it for them.

Do you think every consultant, after picturing all this, would want to attend?

Of course, who wouldn't? Yet why does the “end of the story” always have the same conclusion? Remember the make up of salespeople! 3% are the Freaks of Nature who implement and succeed, 27% who have enough drive to be turned into 3%ers with proper compensation and encouragement, and the 70%ers who only have enough drive to exist. The end result is that the 3%ers will make the trip and the 27%ers and 70%ers will not. In fact, it's events like this that always find us remembering the percentages of the make up of salespeople!

What if your company offered you an incentive such as this trip or something of equal value? So you want to be in the 3% bracket, correct? Yet do you **REALLY** want to be there? Do you **REALLY** want to make the cruise?

Or if you are a business owner, how much do you want to take that dream vacation? Do you want it to remain a dream or do you want to experience it? In the past two years, I have visited Alaska, Jordan, the Galapagos Islands, Qatar, and Africa, and those trips not only fulfilled dreams but exceeded expectations—all because I set goals for myself, and had the drive to meet those goals!



**Have that WHITE HOT BURNING DESIRE to do two things:
*do them now and do them well.***

Get out of your own way! Most of us have a tendency to do things that get us into the 27% bracket. In the Attraction in Action world, it's called being on the correct pathway. Modify your paradigms so you place yourself in the 3% bracket. Second, **you must have written goals** that will get you and keep you on track.

So, let's share some specific tools you'll need to implement your goals. The tools you choose from your toolbox will help you reach the 20% bracket.



"The purpose of goals is to focus our attention. The mind will not reach toward achievement until it has clear objectives. The magic begins when we set goals. It is then that the switch is turned on, the current begins to flow, and the power to accomplish becomes a reality."

- AUTHOR UNKNOWN



SPECIFIC METHODS OF OPERATION

1. Your goals must be in writing, not just thought out. *"My goal is..."*
2. Goals must be clear and concise with measurable results. *"Maintain \$7500 in weekly revenue..."*
3. Write the goal to focus on what you want—the reward! *"By attaining my goal, I will... (insert your reward.)"*
4. The goal must have an ETA (estimated time of accomplishment). *"Reach the minimums for the trip by..."*
5. Write out benefits for reaching the goal. *"By reaching my goal, I'll feel good about making the trip and will enjoy it."*
6. Write out the consequences for not reaching the goal. *"If I don't make the trip, my partner will..."*
7. **Have an Accountability Squad.**
"I will ask Chuck to be my accountability partner. He will speak with me once a week to offer support and ideas that will help me reach my goal."

This is the area for the most growth—publish your written goals to your peers so they know your level of commitment to the goal.



WHY PEOPLE DON'T HAVE GOALS

1.

They have no belief in themselves and lack self-esteem.

2.

They don't know how to set goals or are afraid of the outcome.

3.

They shy away from being held accountable and procrastinate.

Do a mirror check. Do you fit into one of these? If so, just being aware that you fit into one means that half the battle is won. Ask yourself, "Who could I talk with that might help me write my goals?"

A 1953 Yale University study showed that the top 3% of the graduating class wrote out their goals. Their 1986 follow-up study showed that this same 3% were more successful than the rest of the class and that, thirty years later, the difference was that they were still writing goals.

Do what it takes to be part of that 20%, or even better than that, do what it takes to make the 3% club! It's the plans that are laid now and your activity all the way until the end that make the difference.

You have to get out of the way of yourself. You must be unbending. You must be tenacious and maintain persistence until your goals are achieved!

CHUCK BAUER'S GOAL SETTING POINTERS



#1. SET A HEALTHY GOAL

Have a goal bigger than you, like helping someone else. Set goals in the 5 Pillars of Attraction (F.R.E.S.H.): Finances, Relationships, Environment, Spirituality, and Health.



#2. EVALUATE YOUR TOOLS

How can your best skills help you accomplish your goal? What people or resources can help? What additional knowledge or education might help?



#3. MAKE DAILY ACTIONS

Create a “Goal Getting” book and carry it with you. Recite your goal(s), out loud, twice daily. Maintain consistent focused action, including keeping track of your progress with a Personal Minimum Standards chart.

WORK SMARTER. MAKE MORE MONEY. TAKE MORE TIME OFF!

These are the guiding principles behind Chuck Bauer's transformational speeches, seminars, and personalized sessions. For over two decades, Chuck has served others as a motivational speaker and a professional business coach.

As the owner of Chuck Bauer Business Consulting, Chuck has worked with every size of company and across every industry teaching thousands of clients how to work more efficiently, develop business, and generate more revenue. His insights come from observing LIVE sales calls and business transactions through his work as a coach. Clients—including sales professionals, business owners and C-level executives—will tell you time and again that Chuck's tactics have saved deals, streamlined operations, and skyrocketed revenue.

His no-nonsense approach and tell-it-like-it-is style immediately connects with people as he breaks down traditional thinking that keeps people anchored in the past. Chuck's seminars and sessions leave you energized and armed with immediately implementable tactics to face current challenges in your business.



CLIENT REVIEWS

READ MORE AT CHUCKBAUER.COM/SUCCESS



Thanks to guidance and support from Chuck Bauer, for the year ending **September 30th, 2022**, my company earned \$1,823,143.73 — which is a year-over-year increase of **41.08%** over the previous period. And we're continuing to push and grow with a goal of \$5M annually all the while working an average of just 23.75 hours/week! And Chuck's got me working on reducing those hours even more while driving my revenue up!

— **John Drawdy, CPA, Owner**
Paragon Accounting and Tax Solutions, LLC
Woodstock GA



"I started my position with no real sales experience. My employer, John Drawdy, signed me up for Professional Sales Training with Chuck Bauer. Less than 2 months after training, I'm on track to bring in \$540K in annual recurring revenue and \$360K per year in one-time fees. The investment in Chuck's coaching program has been well worth it!"

— **David Busey, Sales Expert**
Paragon Accounting and Tax Solutions,
LLC Woodstock GA



"Less stress, more money, and more time? I'll take it! Since hiring Chuck for his Professional Sales Training, **my net income has increased 73% over the same period last year**. I am now able to dictate my own schedule. I get to spend a few days with my children each week and I finally have my life back."

— **Juli Martin, CPA, Owner JR**
Martin & Associates
Redding CA



"If I didn't work with Chuck before, I'd be working weekends, pretty much throughout the year. A year after I started working with Chuck, my revenue increased 250%"

— **Tatiana Tsoir, CPA**
Linza Advisors Inc.
Mount Kisco NY

CLIENT REVIEWS

READ MORE AT CHUCKBAUER.COM/SUCCESS



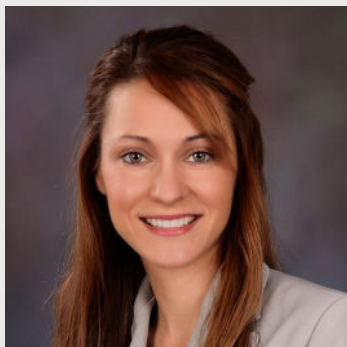
"Chuck helped us take our family-owned company to the next level. We are now an industry leader in operating policies, corporate structure, and marketing. Chuck's expertise, outside evaluation, and strategies have been a huge factor in our growth. He is my mentor—someone I can come to with any business challenge or situation."

— **Lacy Arteaga, VP of
Sales Palleton, Inc.
Omaha NE**



"Chuck has the rare ability to understand any industry. **He quickly learned our business and, based on our needs, created a program that turned our customer service team into a Lean, Mean, Professional Sales Force.** Their confident closing skills, time efficiency, and productivity has increased closing rates on new and existing business. A gifted motivational speaker, Chuck's great sense of humor and no-nonsense approach will keep your people engaged—turning the naysayers into willing participants."

— **Joe Munoz, President
Enginetech, Inc.
Dallas TX**



"**My firm saw \$100K growth in only 6 months of coaching!** More important, these sessions helped me better manage my time, my clients, and my firm. After all, it's not how much money you make—it's how much you keep that matters!"

— **Sarah Berry, CPA, Owner
Sarah Berry, CPA, PLLC
Texarkana TX**



"In April of 2021, there was a sizable hailstorm in a very affluent area of Dallas Fort Worth. The dollar size of this project was going to be over 500,000 dollars. I lost the deal to a competitor. But Chuck has some unique sales tactics -- like handwritten cards -- that turned things around. I implemented exactly as Chuck instructed, and the client changed her mind, canceled her contract with the other guy, and called me. Literally, when signing my contract, she told me that simple handwritten card, that was written in German instead of English, was what sealed the deal!"

— **Josh Sutton, President
Elite Roofing & Restoration Services
Dallas TX**

GET INSPIRED BY OUR FAVORITE QUOTES FROM THESE SUCCESSFUL MINDS

“If you don’t know where you are going,
you might wind up someplace else!”

— **Yogi Berra**

“Insanity is doing the same thing over
and over again and expecting different
results.”

— **Albert Einstein**

“Where your talents and the needs of
the world cross lies your calling.”

— **Aristotle**

“Wisdom often comes of knowing what
to do next.”

— **Herbert Hoover**

“Each of us has a fire in our heart for
something. It’s our goal in life to find it
and keep it.”

— **Mary Lou Retton**

“Every calling is great when greatly
pursued. It is not so much where we
are, but in what direction we move.”

— **Oliver Wendell Holmes**





“The trouble with not having a goal is that you spend your life running up and down the field and never score.”

— **Bill Copeland**

“Each of our acts makes a statement as to our purpose.”

— **Leo Buscaglia**

“There are two great days in a person’s life—the day we are born and the day we discover why.”

— **William Barclay**

“Goals give you long-term vision with short-term motivation—the difference between success and failure.”

— **Ron Marks**

“Don’t ask yourself what the world needs; ask yourself what makes you come alive and then do that. Because what the world needs is people who have come alive.”

— **Harold Whitman**

“Life takes on meaning when you become motivated, set goals and charge after them in an unstoppable manner.”

— **Les Brown**

“Goals determine what you will be.”

— **Julius Erving**

WORDS TO LIVE BY FROM
JIM ROHN
ON HOW DISCIPLINE AND GOAL
SETTING CHANGES LIVES



"I find it fascinating that most people plan their vacations with better care than they do their lives. Perhaps that is because escape is easier than change."

"Goals. There's no telling what you can do when you get inspired by them. There's no telling what you can do when you believe in them. There's no telling what will happen when you act upon them."

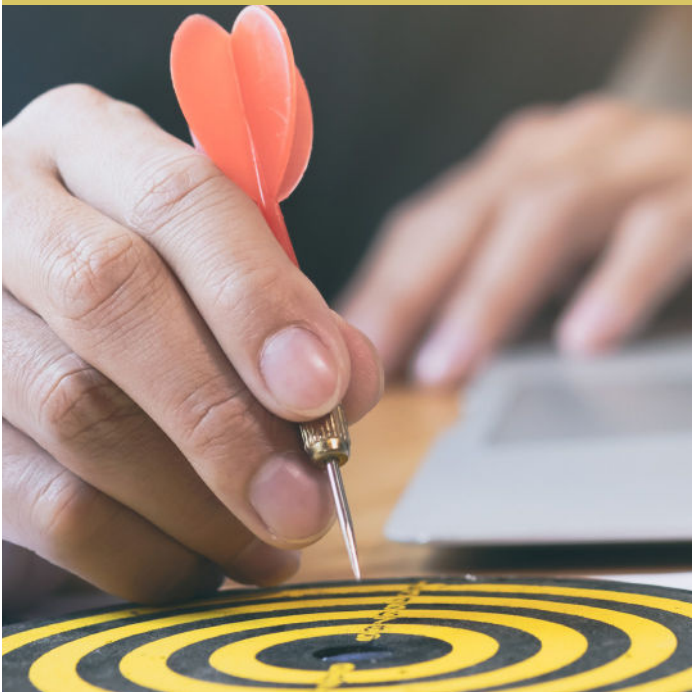
"Discipline is the bridge between goals and accomplishment."

EVERYTHING HAPPENS AS A RESULT OF A GOAL

Every moment you spend in your life is either spent bringing you closer to or moving you away from your goals. The choice is yours.



INSPIRATION FROM BUSINESS COACH **CHUCK BAUER** ON MASTERING YOUR GOALS



Annual goals, committed to in writing, need to be developed in October for the following year. You're already late if you wait until January and it demonstrates a lack of commitment and tenacity.

FOCUS ON GOALS YOU CAN CONTROL

The discipline and character you attain from writing and achieving your goals can be more valuable than the achievement of the goals themselves.

PLAN YOUR PATH ON PAPER.

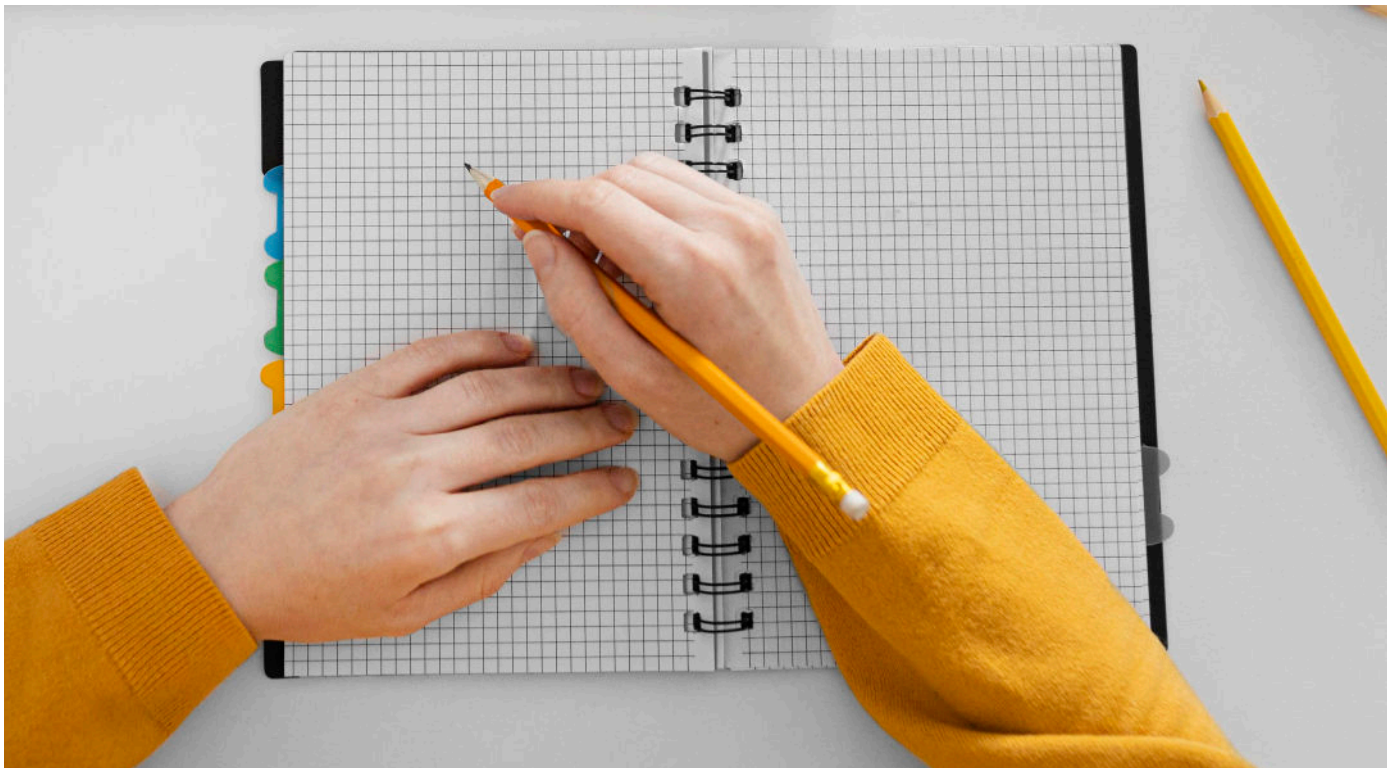
Writing out goals is a large step from just thinking about them. A gigantic step is to develop a specific plan that accompanies each written goal.

Every serious goal must have a benefit as well as a consequence assigned to it. This adds fuel to the fire of your desire to commit.

Want to get real serious about your most significant goals? Then ask 3-4 people to hold you accountable to your goals and plans!



**ONE OF THE
MOST IMPORTANT
THINGS ABOUT
HAVING GOALS IS
HAVING ONE.**





GOLDEN RULES OF GOAL SETTING

WRITTEN BY THE MIND TOOLS CONTENT TEAM
[HTTPS://WWW.MINDTOOLS.COM](https://www.mindtools.com)

Have you thought about what you want to be doing in five years? Are you clear about what your main objective at work is at the moment? Do you know what you want to have achieved by the end of today?

If you want to succeed, you need to set goals. Without goals, you lack focus and direction. Goal setting not only allows you to take control of your life's direction; it also provides you a benchmark for determining whether you are actually succeeding. Think about it: having a million dollars in the bank is only proof of success if one of your goals is to amass riches. If your goal is to practice acts of charity, then keeping the money for yourself is suddenly contrary to how you would define success.

To accomplish your goals, however, you need to know how to set them. You can't simply say, "I want" and expect it to happen...

Goal setting is a process that starts with careful consideration of what you want to achieve and ends with a lot of hard work to actually do it. In between, there are some well-defined steps that transcend the specifics of each goal. Knowing these steps will allow you to formulate goals that you can accomplish.



1. SET GOALS THAT MOTIVATE YOU

It is important that your goals motivate you. When one has little interest in the outcome, the chance of putting in the work to make it happen is slim. Make sure your goals are important and that there is value in achieving them.

Motivation Is Key To Achieving Goals.

Set goals that relate to high priorities in your life. Without this type of focus, you can end up with far too many goals, leaving you too little time to devote to each one. Goal achievement requires commitment, so to maximize the likelihood of success, you need to feel a sense of urgency and have an “I must do this” attitude. When you don’t have this, you risk putting off making the goal a reality. This, in turn, leaves you feeling disappointed and frustrated with yourself making it harder to accomplish other goals. You can end up in a very destructive “I can’t do anything” cycle in your mind.

Tip: *To make sure your goal is motivating, write down why it’s valuable and important to you. Ask yourself, “If I were to share my goal with others, what would I tell them to convince them it was a worthwhile goal?” You can use this motivating value statement to help you if you start to doubt yourself or lose confidence in your ability to make the goal happen.*

2. SET SMART GOALS

SMART



You may have heard of SMART goals, but do you apply the rule? The simple fact is that for goals to be powerful, they should be designed to be SMART.

SPECIFIC

Goals must be clear and well-defined. Vague or generalized goals are unhelpful because they don't provide sufficient direction. Remember, you need goals to show you the way. Make it as easy as you can to get where you want to go by defining precisely where you want to be.

MEASURABLE

Include precise amounts, dates, and so on in your goals so you can measure a degree of success. If a goal is simply defined as "Reduce expenses" how will you know when you are successful?

ATTAINABLE

Make sure it's possible to achieve the goals you set. If you set a goal that you have no hope of achieving, you only demoralize yourself. Also, resist the urge to set goals that are too easy. By setting realistic yet challenging goals, you hit a balance that requires you to "raise the bar" while still bringing great personal satisfaction.

RELEVANT

Goals should be relevant to the path you want your life and career to take. By keeping goals aligned with this, you'll develop the focus you need to do what you want. Set irrelevant goals and you'll fritter your time (and your life) away.

TIME-BOUND

Your goals must have a deadline. This means that you know when you can celebrate success. When you are working on a deadline, your sense of urgency increases, and achievement will come that much quicker.



3. PUT IT IN WRITING

The physical act of writing down a goal makes it real and tangible. You have no excuse for forgetting about it.

WRITING TIP #1:

Use the word “will” instead of “would like to” or “might.” Example: “I will reduce my operating expenses by 10 percent this year,” not “I would like to reduce my operating expenses by 10 percent this year.” The first goal has power—you can see yourself reducing expenses. The second lacks passion and gives you an excuse.

WRITING TIP #2:

Frame your goal statement positively. For example say, “I will hold on to all existing employees for the next quarter” rather than “I will reduce employee turnover.” The first statement is motivating; the second one still has a get-out clause allowing you to succeed even if some employees leave.

Keep your goals in sight.

If you use a to-do list, make yourself a template and put it at the top of your list to incorporate your goals. Post your goals in visible places to remind yourself every day of what it is you intend to do. Put them on your walls, desk, computer monitor, bathroom mirror or refrigerator as a constant reminder.

4. MAKE A PLAN

This step is often missed in the process of goal setting. You get so focused on the outcome that you forget to plan all of the steps that are needed along the way. By writing out the individual steps, and then crossing each one off as you complete it, you'll realize that you are making progress towards your ultimate goal. This is especially important if your goal is big and demanding, or long-term.

5. PERSIST!

Goal setting is an ongoing activity, not just a means to an end. Build in reminders to keep yourself on track, and make regular time slots available to review your goals.

Your destination may remain similar over the long term, but the action plan you set for yourself along the way can change significantly. Make sure the relevance, value, and necessity remain high.

Goal setting is much more than simply saying you want something to happen. Unless you clearly define exactly what you want and understand why you want it, odds of success are considerably reduced.

By following the Five Golden Rules of Goal Setting, you can set goals with confidence and enjoy the satisfaction that comes.





ACHIEVING YOUR GOALS

ZACH BRYANT

What happens when you achieve a goal before the year ends? You update it!

Zach Bryant of Bryant + Associates P.C. completed Professional Sales Training sessions with Chuck Bauer and immediately applied his passion for business development to lesson implementation.

Using Chuck's strategies, Zach exceeded his revenue goal for the ENTIRE YEAR before the end of the first quarter!

Zach's phenomenal success caused him to achieve his goal with plenty of time to spare. Rather than give up there, he then updated this plan to include making even more money and more clearly defined his plan to get there.



**SEE ZACH BRYANT'S BEFORE AND AFTER
GOAL PLANS ON THE NEXT PAGE.**

GOAL MASTERY: GOAL PLAN

PERCENTAGE COMPLETE: _____ 0%
GOAL PRIORITY (PICK ONE): ☒ E ☐ U ☐ NU
START DATE: _____ 01/01/19
COMPLETE DATE: _____ 12/31/19

GOAL TITLE: 2019 Income Goal \$150,000 -> Road to a \$500k year

PLAN FOR COMPLETION:

In office 42 weeks. 10 weeks out for Conferences, client onsite, vacation, hunting trips, holidays. Need to close 2 per month (avg. \$5000) x 12 = \$120,000. Plus misc. back work will exceed \$30K. To guarantee these numbers, need to have minimum of 8 Qualified Discovery/Conclusion meetings with a (25% close JJ and 75% self-generated) rate each month. So need to have 96 Qualified prospective client meetings for the year in 42 weeks. JJ is to get me 2-4 meetings a week. I need to get self-generate 1 discovery meeting myself each week. These will be generated by SEO, networking, CCC, and social media. Schedule 2 more networking meetings during each month.

ZACH BRYANT'S ANNUAL REVENUE GOAL - START OF THE YEAR

GOAL MASTERY: GOAL PLAN

PERCENTAGE COMPLETE: _____ 0%
GOAL PRIORITY (PICK ONE): ☒ E ☐ U ☐ NU
START DATE: _____ 01/01/19
COMPLETE DATE: _____ 12/31/19

GOAL TITLE: 2019 Income Goal \$350,000

PLAN FOR COMPLETION:

In office 42 weeks. 10 weeks out for Conferences, client onsite, vacation, hunting trips, holidays. Need to close 3 per month. Plus misc back work. To guarantee these numbers need to have minimum of 8 Qualified Discovery/Conclusion meetings with a (25% close JJ and 75% self generated) rate each month. So need to have 96 Qualified prospective client meetings for the year in 42 weeks. JJ is to get me 1-2 meetings a week. I need to get self generate 1 discovery meeting myself each month. These will be generated by SEO, networking, CCC, and social media. Schedule 2 more networking meetings during each month.

ZACH BRYANT'S ANNUAL REVENUE GOAL - AFTER THE FIRST QUARTER



ACHIEVING YOUR GOALS

GREG O'BRIEN

Greg O'Brien saw Zach Bryant's annual goal as a challenge rather than a deterrent. In keeping with the kind of passion it takes to be a student of Chuck Bauer, Greg decided to make an annual revenue goal of his own...

GOAL TITLE: Fiscal Year Sales - Target \$455k NEW Business

PLAN FOR COMPLETION:

In order to hit \$455k of NEW sales in the next 12 months, we will need to average 2 new clients per month, with the average monthly fee of \$1600. This is quite doable. Report back to the squad monthly, keep my feet to the fire.

Second, our Tax Plan onboarding fees should be at least \$6,000 per new clients, leading to an additional \$145k of revenue. If I hit BOTH of these metrics, we will actually hit \$605k in NEW sales.

Current Run Rate = \$900k. With goal added in, we can hit a revenue run rate of \$1.355M!

Expected Roadblocks: Staffing; Time

Knowledge or Coaching: Chuck; CTC; Podcasts

Reward: Trip to the Caribbean with friends

Consequence: No trip :(

Accountability Squad:

1. Chuck Bauer
2. Wade Critides
3. John Malone
- 4.

Thoughts/Comments/Ideas

- 1) Continue w/ aggressive hiring in Q4 to get myself 100% out of production and 100% into biz dev.
- 2) Continue to become thought leader through podcasting, writing
- 3) Leverage staff for more Client Care Calls for referrals
- 4) Leverage partnerships w/ other professionals
- 5) Talk to 2 biz prospects per week. Organize and systematize follow ups and TOMA campaigns.

I will publish my goal action plan to my accountability team.

☒ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☒ No



ACHIEVING YOUR GOALS

CRAIG CHEESEMEN

Craig Cheeseman is one of the many successful students of Business Coach Chuck Bauer. After six months in Chuck Bauer's Sales Professionals MasterMind program, Craig has not only solved his many challenges but escalated productivity and profit in all areas!

This example plan outlines his goal titled “2013 Income Goal \$350,000.”

Here, Craig is thinking through and planning on how to meet a specific measurable goal of earning \$350,000 between January 7th, 2013, and December 20th, 2013. He has motivated himself by setting rewards and consequences with review points at 5 months as well as at the end of the full year.

In the comments and ideas section, Craig took the opportunity to break apart where his numbers need to be in order to determine if he has met his mid-point reward/consequence time marker, as well as ensure that he will remain on track for the remainder of the year.

HOW HAVE YOU APPROACHED THE PLANNING FOR YOUR GOALS?

DID YOU REMEMBER TO INCLUDE WAYS TO MEASURE YOUR PROGRESS?

GOAL TITLE: 2013 Income Goal \$350,000

PLAN FOR COMPLETION:

1 Set appt = \$777 / 450 set appt. = \$350,000 / set 15 appt per work week. / 30 work weeks for the Year. Jan, Feb, March, April, May, Sept, Oct. hold appts first 3 weeks of each month for total of 21 weeks. June, July, August, December hold appointments 2 weeks each month for total of 8 weeks

November hold appointments 1st week of month only for total of 1 week. $21+8+1=30$ total weeks

Expected Roadblocks: Distractions on Mondays, Run out of VIPs to add to TOMA

Knowledge or Coaching: Chuck Coaching; Leaders Conference, Books?

Start Date: 01/07/13

Start Date: 12/20/13

Reward: Hit 5 month goal = Buy new Yamaha 4 stroke for boat. Year Goal = Deb, New Year's Trip '14

Consequence: 5 month goal not reached = sell my boat. Fail year goal = cancel 3 week hunt in Nov.

Accountability Squad:

1. Mark Whealy

2. Jon Fortune

3. Chuck Bauer

4. Deb Cheeseman

I will publish my goal action plan to my accountability team.

☒ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☒ Yes ☐ No

Thoughts/Comments/Ideas

5 Month Goal Jan - May, Set 225 Appointments = \$175,000...

Track weekly Activity

**keep adding VIPs to TOMA, Mondays are Call days, hold appointments on T, W, TH. Use WebEx Weekly schedule, generally scheduling appts first 3 weeks of month



ACHIEVING YOUR GOALS

LEE ODEMS

Lingiam “Lee” Odems, Jr., 67, passed away peacefully in February 2020 surrounded by his loved ones. A long-time student and close friend of Chuck Bauer, Lee is survived by his wife who continues to live in Washington DC. He is deeply missed.

At the time that this marketing plan was written, Lee had fallen on hard times with his business. This plan, along with his unending discipline and tenacity, resulted in him becoming a millionaire years later. While this plan is over a decade old, it continues to stand as an excellent example of how to thoroughly plan through a complicated goal such as business marketing.

The goal of this marketing plan is to:

- Touch each prospect at least 15 times per year
- Provide useful information, especially to MVPs and previous clients
- Make it easy for individuals to provide referrals and reward them
- Keep agent and company name positively highlighted
- Write 24 contracts per year for referrals and previous clients

Annual Tasks

- **Personal Calendar** - Mail a magnetic calendar to each person in the database, include a holiday letter. Calendars go on the refrigerator and have your name in front of them all year long.
 - **Action date:** To be mailed out November 15th
 - **Prep tasks:** Order calendars in August. Write letters and print labels by November 1st.

- **HUD 1 Mailing** - To each of the clients who settled during 2004, send out HUD 1s with a letter letting them know the document contains important information that they may need to complete their tax returns. Have HUD 1 highlighted for relevant info.
 - **Action date:** To be mailed on January 3rd 2005.
 - **Prep tasks:** Collect HUD 1s throughout year, write a letter and print labels on Dec 15th.
- **Beginning of the year calls** - Agent or assistant will call everyone on the mailing list and ask if they have any real estate needs for the upcoming year.
 - **Action date:** To be done between January 5th and 12th
 - **Prep tasks:** Review database and determine which calls will be made by agent vs assistant.

Quarterly Tasks

- **Database Review** - Review the database to weed out duds and categorize MVPs.
 - **Action dates:** Jan 1, April 1, July 1, Oct 1.
- **County homeownership info** - Mail a hard copy of the counties' quarterly housing demographics and statistics to past clients and MVPs in Prince William and Stafford counties. Put info on the website and email link to appropriate individuals in the email database
 - **Action dates:** To be done Feb 28, April 30, Aug 30, and Oct 30.
 - **Prep tasks:** Identify recipients and corresponding counties, write a cover letter, make copies of the report, print labels, mail report and letter. Format for the website.
- **Email "newsletter"** - Create an email that informs people of what's going on at BARE and in the Real Estate community. Send to everyone in the database who has an email.
 - **Action dates:** To be done Feb 1, April 1, Aug 1, Oct 1.
 - **Prep tasks:** Write newsletter; post to the website.

- **Quarterly phone contact shmoozing** - Agent to call 1/3 of previous clients and MVPs to touch base and see how they are doing.
 - **Action dates:** To be done in the first week of April, August, and October.
 - **Prep tasks:** Review database and identify who to call each quarter.

Monthly Tasks

- **Monthly postcards** - Mail postcards to everyone in the database with Client type "Postcard mailing." Continue to use existing postcard stock for the remainder of the year and order new line for next year.
 - **Action dates:** To be done on the 4th of each month.
- **Home Buyer Club content** - To make most of the monthly newsletter, update content and features next month. Review site to determine best ways to personalize it and keep information fresh.
 - **Action dates:** To be done the week prior to HB emails being sent.
- **Home Buyers Club email** - Send monthly emails to the database to keep your name and face in front of them. Done on autopilot by Home Buyers Club. Part of daily tasks is to put email addresses into the database.
- **Press release to Potomac News** - Each month, fax press release with a short copy to go into business announcements section. Initial topics – BARE upgrades customer service by using a transaction coordinator, BARE welcomes new agent Freddie Butler, BARE reaches into the multicultural community.
 - **Action dates:** Based on announcement publication schedule.
- **Develop a one-page article** - Add one article written by an agent, broker, staff, or partner (lender, settlement attorney) to the website. Email a copy to those who might be interested.
 - **Prep tasks:** develop a list of topics and schedule, assign to writers.

Weekly Tasks

- **Washington Post Real Estate Articles** - email interesting articles to 5 people. Each Saturday, select an interesting article. On Monday, add as a link to website, email to 5 people along with a quick note.

Daily Tasks (or As Needed)

- **Add one name to the database** – Add the name of a new prospect to the Top Producer database; indicate if they should be included in the post card mailing. Add email address to Home Buyer Club.
- **Send out note or Treasury of Quotes** – Send out a note card with a personal note and Treasury of Quotes. Can be to new person or to someone that you had a positive recent encounter with.
- **After closing** – Send out BARE survey and request for referrals. Send out gift certificate for completed survey. Send note to other agent in the transaction. Send \$250 contribution to local charity. Track results; keep the spreadsheet up to date.
- **After referral** – Send gift certificate to the source of referral.

Frequency	Task	Person	Time	Cost	Annual
Annual	Personalized Calendar	Michele/Angie	4 hours	\$500	\$500
Annual	HUD 1 Mailing	Michele/Angie	4 hours	\$25	\$25
Annual	Beginning of the year calls	Lee/Angie	25 hours	\$0	\$0
Quarterly	Database review	Lee/Michele	1 hour	\$0	0
Quarterly	County home ownership info	Michele/Angie	3 hours	\$35	\$135
Quarterly	E-mail "newsletter"	Lee/Michele	3 hours	\$0	\$0
Quarterly	Quarterly phone contact	Lee	12 hours	\$0	\$0
Monthly	Monthly postcards	Angie	2 hours	\$188	\$2256
Monthly	Home Buyer Club update	Michele/Angie	2 hours	\$0	\$0
Monthly	Home Buyers Club e-mail	Cruise Control	0 hours	\$30	\$360
Monthly	Press release to Potomac	Michele/Angie	1 hour	\$0	\$0
Monthly	Develop a one-page article	Lee/Michele	3 hours	\$0	\$0
Weekly	Washington Post Real Estate Articles	Lee	1 hour	\$0	\$0
Daily	Add one name to database	Lee/Michele	5 minutes	\$0	\$0
Daily	Send out note or Treasury of quotes	Lee/Angie	10 minutes	\$2	\$500

After closing	BARE survey & gift cert	Angie	10 minutes	\$52	\$1560
After referral	Gift certificate to source of referral	Lee/Angie	20 minutes	\$51	\$510
After closing	Note to other agent	Lee/Angie	10 minutes	\$2	\$60
After closing	\$250 contribution to local charity	Michele/Angie	10 minutes	\$250	\$7500
After closing	Track results	Angie	5 minutes	\$0	\$0

Annual Marketing Budget Total: \$13,406

GOAL IDEAS: WHERE DO YOU NEED MORE PUNCH?

- Positive Sales Edge Attitudes
- Public Speaking
- Gaining New Prospects
- Overcoming Objections
- Sales Management
- Time Management
- Closing More Sales
- 15 Step Referral Program
- Attraction Skills
- Automation & Systematization
- Being Chased by Prospects / Clients
- Career Path
- Cloud Infrastructures
- Compensation
- Confidence
- Constant Contact
- Corporate Culture
- Creating Anticipation
- Customer Service
- Daily Metrics
- Delayed Decisions
- Desire
- Discipline
- Discovery
- Efficiencies & Urgency
- Email / Mail Newsletters
- Emergent Sales Challenges
- Employee Reviews
- Encouragement
- External Communication
- Face-To-Face Presentations
- Financial Reports
- Focus
- Finality
- Going Paperless
- Health/Fitness/Nutrition
- High Productivity
- iContact
- Identifying Opportunities
- Internal Communication
- Interviewing & Hiring
- Leadership & Initiative
- Listening
- Live Presentations
- Managing Daily Activity
- Marketing Campaigns & Tools
- Maximizing Outlook
- Motivation
- Negotiation & Psychology
- Non-Transactional Sales
- Objections & Push Back
- Office Organization
- One-on-One/Staff Meetings
- On-going Challenges
- Over-reacting
- Personal Balance
- Personal Development
- Personality Assessments
- Personality Selling
- Phone Skill & Presentations
- Pipeline Reports
- Profit & Loss Statements
- Proposals & Delivery
- Prospect / Client Win-Wins
- Quality Work
- Recruiting & Retaining
- Sales Distinctions
- Sales Jeopardy
- Sales Platforms
- Sales Processes
- Salesforce.com
- Screencasting
- Setting & Effecting Deadlines
- Setting & Accomplishing Goals
- Self-Management
- Social Media
- Solutions & Implementation
- Solving/Preventing Challenges
- Specific Next Steps
- Staff Reviews
- Starbucks Presentation
- Strategic Sales
- Success Dressing & Traits
- Tactical Approaches
- Takeaways
- Taking Quality Time Off
- Team Work
- Tenacity
- Training New Hires
- Transactional Sales
- Utilizing Sales Tools
- Video E-mail
- Zoom Presentations
- What Causes Sales
- Writing a Business Plan
- Your CRM System

COACHVILLE.COM: CLEAN SWEEP™ PROGRAM

You have more natural energy when you are clear with your environment, health and emotional balance, money and relationships. The Clean Sweep™ Program consists of 100 items that, when completed, give you the vitality and strength you want. The Clean Sweep™ Program is the property of Coach U, Inc.

INSTRUCTIONS

- **Answer each question.** If true, check the box. **DO NOT** check the box until the statement is virtually always true. If the statement does not apply or will never be true for you, check the box. You may also change the statement to fit your situation better.
- **Summarize each section.** Add up the number of **TRUE** boxes for each of the 4 sections.
- **Keep playing.** The goal is to have the entire chart filled in. This process may take 30 or 360 days, but you can achieve a Clean Sweep! Use an accountability partner to assist you and check back once per year for maintenance.

PROGRESS CHART

Date	Points (+/-)	Score

CURRENT SCORE

#	A	B	C	D
1				
2				
3				
4				
5				

#	A	B	C	D
6				
7				
8				
9				
10				

#	A	B	C	D
11				
12				
13				
14				
15				

#	A	B	C	D
16				
17				
18				
19				
20				

#	A	B	C	D
21				
22				
23				
24				
25				

Restart Clean Sweep

COACHVILLE.COM: CLEAN SWEEP™ PROGRAM

A. PHYSICAL ENVIRONMENT

- ☐ My personal files, papers and receipts are neatly filed away.
- ☐ My car is in excellent condition. (Doesn't need mechanical work, cleaning or replacing.)
- ☐ My home is neat and clean. (Vacuumed, closets and windows clean, desks and tables clear, and furniture in good repair.)
- ☐ My appliances, machinery, and equipment (refrigerator, toaster, snowblower, water heater, toys, etc.) work well.
- ☐ My clothes are pressed, clean, and make me look great. There are no wrinkles, baskets of laundry, or torn or ill-fitting clothes.
- ☐ My plants and animals are healthy and loved.
- ☐ My bed lets me have the best sleep possible.
- ☐ I live in a home/apartment that I love.
- ☐ I surround myself with beautiful things.
- ☐ I live in the geographic area I choose.
- ☐ I consistently have adequate time, space and freedom in my life.
- ☐ I am not damaged by my environment.
- ☐ There is ample and healthy light around me.
- ☐ I am not tolerating anything about my home or work environment.
- ☐ My environment is productive and inspiring.
- ☐ I recycle.
- ☐ I use non ozone-depleting products.
- ☐ My hair is the way I want it.
- ☐ I surround myself with music, which makes my life more enjoyable.
- ☐ My bed is made daily.
- ☐ I don't injure myself or bump into things.
- ☐ People feel comfortable in my home.
- ☐ I drink purified water.
- ☐ I have nothing around the house or in storage that I do not need.
- ☐ I am consistently early or on time.

A. Physical Environment

_____ **NUMBER OF BOXES CHECKED**

COACHVILLE.COM: CLEAN SWEEP™ PROGRAM

B. HEALTH & EMOTIONAL BALANCE

- ☐ I rarely use caffeine. (I use caffeine less than 3 times per week.)
- ☐ I rarely eat sugar. (I eat sugar less than 3 times per week.)
- ☐ I rarely watch television. (I watch less than 5 hours of television per week.)
- ☐ I rarely drink alcohol. (I consume less than 2 drinks per week.)
- ☐ My teeth and gums are healthy. (I have seen dentist in last 6 months.)
- ☐ My cholesterol count is healthy.
- ☐ My blood pressure is healthy.
- ☐ I have had a complete physical exam in the past 3 years.
- ☐ I do not smoke tobacco or other substances.
- ☐ I do not use illegal drugs or misuse my prescribed medications.
- ☐ My weight is within my ideal range.
- ☐ My nails are healthy and attractive.
- ☐ I have had a complete eye exam within the past two years.
- ☐ I use well-made sunglasses.
- ☐ I don't rush or use adrenaline to get jobs done.
- ☐ I have a rewarding life beyond my profession.
- ☐ I have something to look forward to every day.
- ☐ I have no habits that I find unacceptable.
- ☐ I am aware of the physical or emotional problems or conditions that I have and am now fully taking care of all of them.
- ☐ I consistently take evenings, weekends and holidays off, and take at least two weeks of vacation every year.
- ☐ I have been tested for the AIDs antibody.
- ☐ I do not suffer.
- ☐ I floss daily.
- ☐ I walk or exercise at least three time per week.
- ☐ I hear well.

B. Health & Emotional Balance

NUMBER OF BOXES CHECKED

COACHVILLE.COM: CLEAN SWEEP™ PROGRAM

C. MONEY

- ☐ I currently save at least 10% of my income.
- ☐ I pay my bills on time, virtually always.
- ☐ My income source/revenue base is stable.
- ☐ I know how much I must have to be minimally financially independent and I have a plan to get there.
- ☐ I have made good on any money I borrowed.
- ☐ I have written agreements and am current with payments to individuals or companies to whom I owe money.
- ☐ I have 6 months of living expenses in a money market account.
- ☐ I live on a weekly budget that allows me to save and not suffer.
- ☐ All of my tax returns have been filed and my taxes have been paid.
- ☐ I currently live well within my means.
- ☐ I have excellent medical insurance.
- ☐ I have a financial plan for the next year.
- ☐ My assets are well insured.
- ☐ I have no legal clouds hanging over me.
- ☐ My will is up-to-date and accurate.
- ☐ Any parking tickets, alimony or child support are paid and current.
- ☐ I do not worry about my investments.
- ☐ I know how much I am worth.
- ☐ I am on a career track that is or will soon be financially and personally rewarding.
- ☐ My earnings are commensurate with the effort I put into my job.
- ☐ I have no "loose ends" at work.
- ☐ I am in a relationship with people who can assist in my career/professional development.
- ☐ I rarely miss work due to illness.
- ☐ I am putting aside enough money each month to reach financial independence.
- ☐ My earnings outpace inflation, consistently.

C. Money

_____ NUMBER OF BOXES CHECKED

COACHVILLE.COM: CLEAN SWEEP™ PROGRAM

D. RELATIONSHIPS

- ☐ I have told my parents, in the last 3 months, that I love them.
- ☐ I get along well with my sibling(s).
- ☐ I get along well with my co-workers/clients.
- ☐ I get along well with my manager/staff.
- ☐ There is no one who I would dread or feel uncomfortable “running across.”
- ☐ I put people first and results second.
- ☐ I let go of the relationships that drag me down or damage me. (“Let go” means to end, walk away from or no longer be attached to.)
- ☐ I have communicated with everyone who I have hurt, even if it wasn’t fully my fault.
- ☐ I do not gossip or talk about others.
- ☐ I am fully caught up with letters and calls.
- ☐ I always tell the truth, no matter what.
- ☐ I tell people how they can satisfy me.
- ☐ I have a circle of friends/family who love and appreciate me for who I am.
- ☐ I have fully forgiven those people who have hurt or damaged me, deliberate or not.
- ☐ I receive enough love to feel good.
- ☐ I am a person that people can count on.
- ☐ I quickly clear miscommunications and misunderstanding when they do occur.
- ☐ I live life on my terms, not by the rules or preferences of others.
- ☐ There is nothing unresolved with my past loves or spouses.
- ☐ I am in tune with my wants and needs and make sure they are taken care of.
- ☐ I do not judge or criticize others.
- ☐ I do not “take personally” the things that people say to me.
- ☐ I have a best friend or soul mate.
- ☐ I state requirements rather than complain.
- ☐ I spend time with people who don’t try to change me.

D. Relationships

_____ **NUMBER OF BOXES CHECKED**

COACHVILLE.COM: CLEAN SWEEP™ PROGRAM

BENEFITS

On the lines below, jot down benefits, results, and shifts that happen in your life because you handled an item in the Clean Sweep™ Program. Keeping track of these benefits will give you a sense of progress and will encourage you to continue making healthy changes in your life.

Date	Benefit

GOAL MASTERY APPLICATION

The Top GoalMastery Categories are:

- | | |
|---------------------|--------------------------|
| 1. Spirituality | 7. Career Development |
| 2. Finances | 8. Recreation & Leisure |
| 3. Relationships | 9. Home & Real Estate |
| 4. Environment | 10. Personal Development |
| 5. Health & Fitness | 11. Technology |
| 6. Time Management | 12. Top Ten List |

STEP ONE

Stay focused. Stop, ponder your thoughts, and really think about the important things you want to get accomplished for the new year.

STEP TWO

Once the main categories are complete, you'll find yourself with over 100 goals you'd like to work on/accomplish for the year. From that group, pick your Top Ten and write them down. After listing your top ten goals, transfer them to the ten Goal Plan forms.

STEP THREE

Implement immediately—don't procrastinate! Ask yourself this question: "Are you serious about your top goals?" Get strong with the fact that **failure is not an option.**

**GET ORGANIZED. DOWNLOAD A
FULL-YEAR CALENDER AT
[HTTPS://CHUCKBAUER.COM/CALENDAR/](https://chuckbauer.com/calendar/)**

Goal Getting: Spirituality

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Goal Getting: Environment

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Goal Getting: Finance

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Goal Getting: Fitness

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Goal Getting: Relationships

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Goal Getting: Time Management

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Goal Getting: Career

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Goal Getting: Real Estate

1.
2.
3.
4.
5.
6.
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9.
10.

Goal Getting: Leisure

1.
2.
3.
4.
5.
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7.
8.
9.
10.

Goal Getting: Personal Development

1.
2.
3.
4.
5.
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7.
8.
9.
10.

Goal Getting: Technology

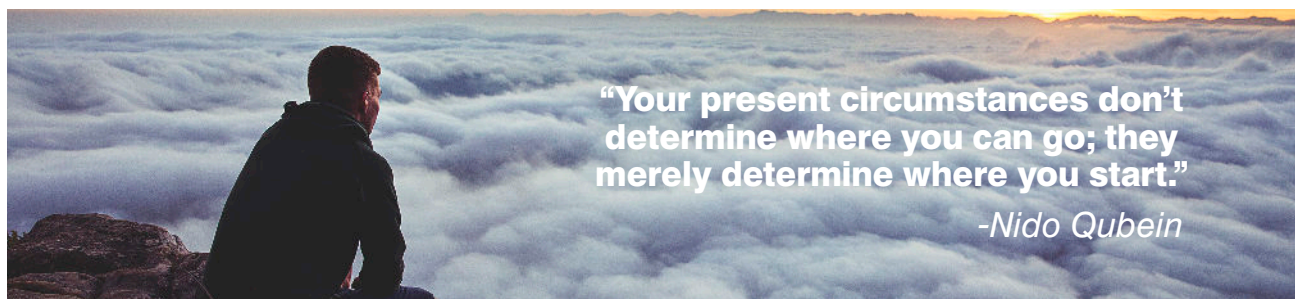
1.
2.
3.
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5.
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8.
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10.

Goal Getting: Add Your Own

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

TOP 10 GOALS: CONGRATULATIONS!

1.		DEADLINE:	
2.		DEADLINE:	
3.		DEADLINE:	
4.		DEADLINE:	
5.		DEADLINE:	
6.		DEADLINE:	
7.		DEADLINE:	
8.		DEADLINE:	
9.		DEADLINE:	
10.		DEADLINE:	



GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #1 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #2 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #3 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #4 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #5 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #6 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #7 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #8 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐ E ☐ U ☐ NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #9 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐ Yes ☐ No

I will publish my goal to others (social media, in person, blog).

☐ Yes ☐ No

GOAL MASTERY: GOAL PLAN

GOAL PRIORITY (PICK ONE):

☐

E

☐

U

☐

NU

START DATE: _____

DEADLINE DATE: _____

TOP GOAL #10 TITLE:

PLAN FOR COMPLETION:

Expected Roadblocks:

Knowledge or Coaching:

Reward:

Consequence:

Accountability Squad:

1. _____

2. _____

3. _____

4. _____

Thoughts/Comments/Ideas

I will publish my goal action plan to my accountability team.

☐

Yes

☐

No

I will publish my goal to others (social media, in person, blog).

☐

Yes

☐

No

RELATED RESOURCES

Chuck Bauer Business Training	https://chuckbauer.com/
The Concierge CPA™	https://yourcca.com/
Achieving Your Goals: Using the GoalMastery Goal Planner	https://chuckbauer.com/achieve-your-goals/
Importance Of 1st Monday In October	https://chuckbauer.com/importance-1st-monday-october/
Goals: Ready, Aim, FIRE!	https://chuckbauer.com/goals-ready-aim-fire/
Stay Focused - Even If You Think You Can't	https://chuckbauer.com/stay-focused/
Becoming an Unconscious Competent	https://chuckbauer.com/becoming-unconscious-competent/

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