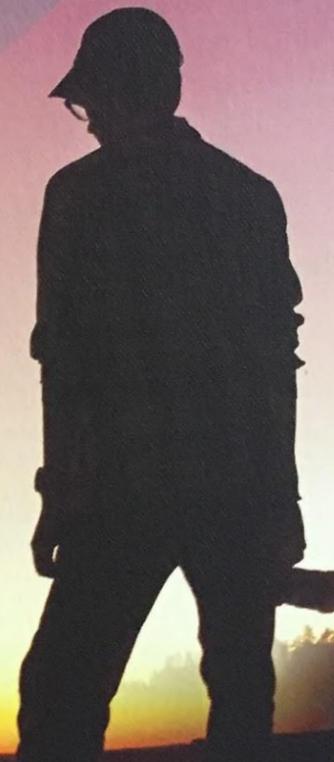


# Make 2018 Your Best Year Yet!

## – Planning An Epic Year –

Get my NEWLY IMPROVED Annual Planning Process and worksheet that has helped me and my team continually achieve amazing things, gain momentum in the New Year, gain massive clarity, and focus.

“THE ULTIMATE GOAL  
AS AN ENTREPRENEUR  
ISN'T MONEY -  
IT'S COMPLETE  
CONTROL  
OVER YOUR  
TIME.”



Planning An  
**Epic Year**



# Weekly Dose Of Awesomeness

“Let me just tell you... I’ve made about \$60-65,000 in 2017 from doing wholesaling on the side. My school is almost over and this will be my full time gig now.

You guys have helped me go from worrying what job I’ll get out of college to not only knowing what job I’ll have, but not having to worry about barely making it.

I’m most excited for the master course with the 7 or 8 different pros who will be sharing what they do that works. I’m pumped to finally be on my own with you guys!!”

- **Caleb L. - Tennessee Investor**



Watch the live stream!

51:26

Settings HD Full Screen

Pause Volume Settings YouTube Full Screen

The image shows a YouTube video player interface. A semi-transparent dark overlay is positioned over the video content. On the left side of the overlay, there is a left arrow icon, the text "Watch the live stream!", and a timer showing "51:26". Below the video area, there is a progress bar. At the bottom of the overlay, there are three icons: a gear icon with "HD" next to it, a window icon, and a full-screen icon. An orange arrow points from the bottom right of the overlay to the settings gear icon in the video player's bottom control bar. The video player's bottom control bar also includes a pause icon, a volume icon, the YouTube logo, and a full-screen icon.

Adrian  
Last active 17 hours ago

Hey Aqwe,  
Questions you would like to see answered on a Mastermind Call?  
Shoot them through here and we will get to them as soon as possible!  
Thanks!

The image shows a chat window for a user named Adrian. The chat header includes the name "Adrian" and "Last active 17 hours ago". The chat message contains the text: "Hey Aqwe, Questions you would like to see answered on a Mastermind Call? Shoot them through here and we will get to them as soon as possible! Thanks!". There are left and right arrow navigation icons on either side of the chat message.

(for best quality, select HD from player settings)

# Ready To Get Started?

Type "LET'S GO" in the comment box

# This May Be You...

- Are a high achieving entrepreneur and ***don't want to settle for living an average life***
- Feel like ***you're working your butt off but not getting closer*** to your ultimate goals
- **You set goals for the year but by March you forget about them** because you're not really making big progress... then you let life choose what you spend your time on
- Find yourself ***saying "yes" to almost any opportunity that looks "good"*** and is profitable
- Start each day ***feeling overwhelmed at everything you have to do*** and the little time you have to do it
- Wish that finally one of your businesses or business ideas would grow to its full potential rather than doing "decent" and leveling off

Plan to start an  
**Epic Year**



# This May Be You...

- You know you're able to achieve **MORE...** **but can't figure out how to crack through that wall**
- You're growing your team but **MORE** overwhelmed now than before
- You always **sabotage yourself and your goals...** but you don't know why

# My Own Journey

From unfocused meandering and “busyness” to focused, intentional, and happy.



# My 5 Step Process To An Epic Year



# My 4 Step Process To An Epic Year

1. **My Mindset Practices:** Your Biggest Asset / Enemy
2. Clarifying Your **“Life Vision”**
3. Creating **An Ironclad Yearly Plan**
4. Keeping **Course** During The Year
5. Crafting A **“Winning” Environment**



# 1. Time For A Mindset Reset

What's actually important in the grand scheme of things???



# Clearing Your Mind For The **Important Things**

“Based on this are impulsive and logic thinking, where more complex decisions are made. According to multiple sources on the Internet, the average amount of remotely conscious decisions an adult makes each **day** equals about **35,000**. In contrast, young children only make about 3,000 decisions each **day.**”



In **decision** making and psychology, **decision fatigue** refers to the deteriorating quality of **decisions** made by an individual, after a long session of **decision** making. It is now understood as one of the causes of irrational trade-offs in **decision** making.

# Nailing The Simple Things...



**AFTER**

# Urgency (or lack of) Is One Of Our Biggest Problems...

... and one of the biggest fixes I've found is  
to **recognize your own mortality.**

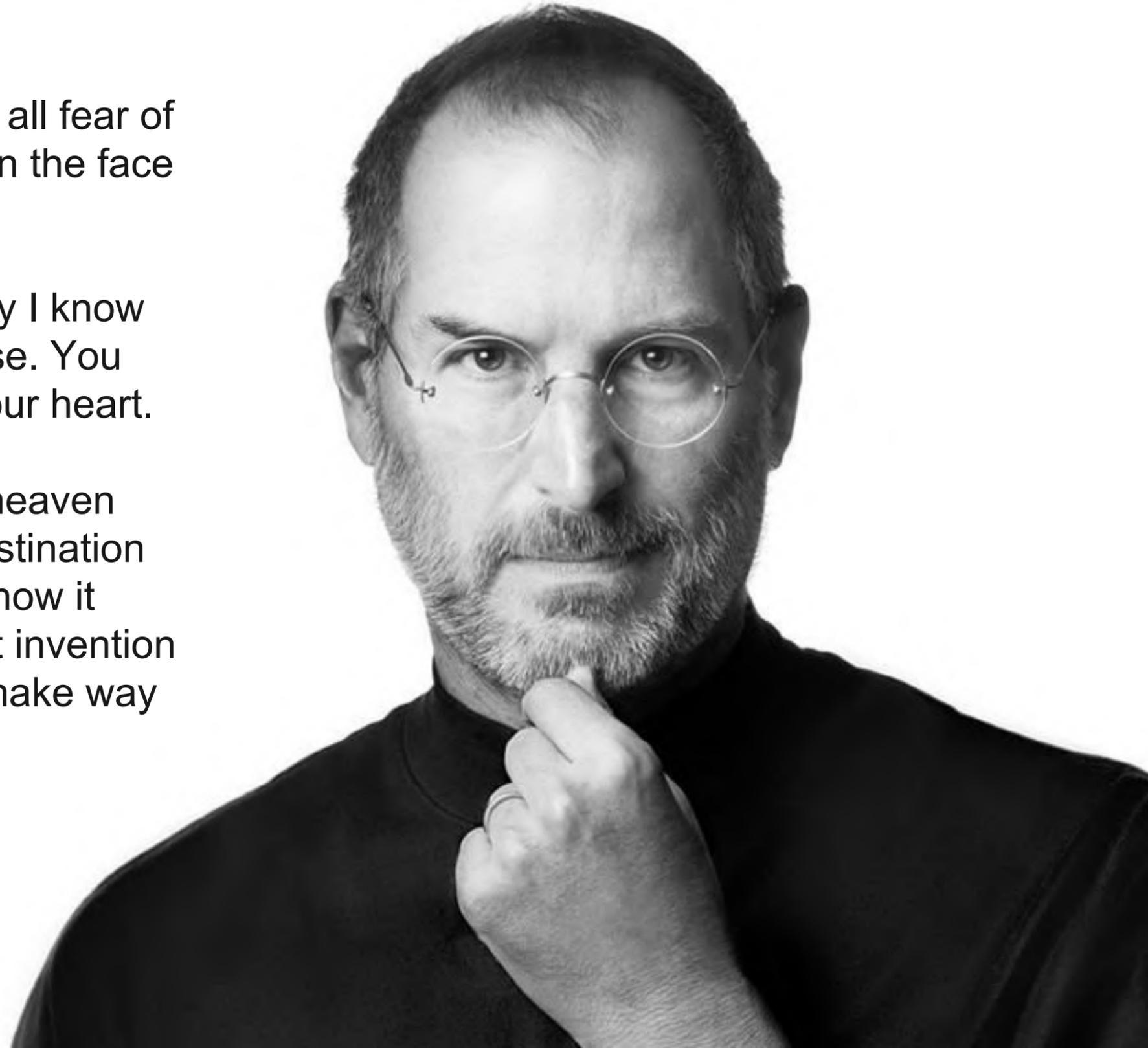
“Remembering that I'll be dead soon is the **most important tool I've ever encountered to help me make the big choices in life.**

Almost everything--all external expectations, all pride, all fear of embarrassment or failure--these things just fall away in the face of death, leaving only what is truly important.

Remembering that you are going to die is the best way I know to avoid the trap of thinking you have something to lose. You are already naked. There is no reason not to follow your heart.

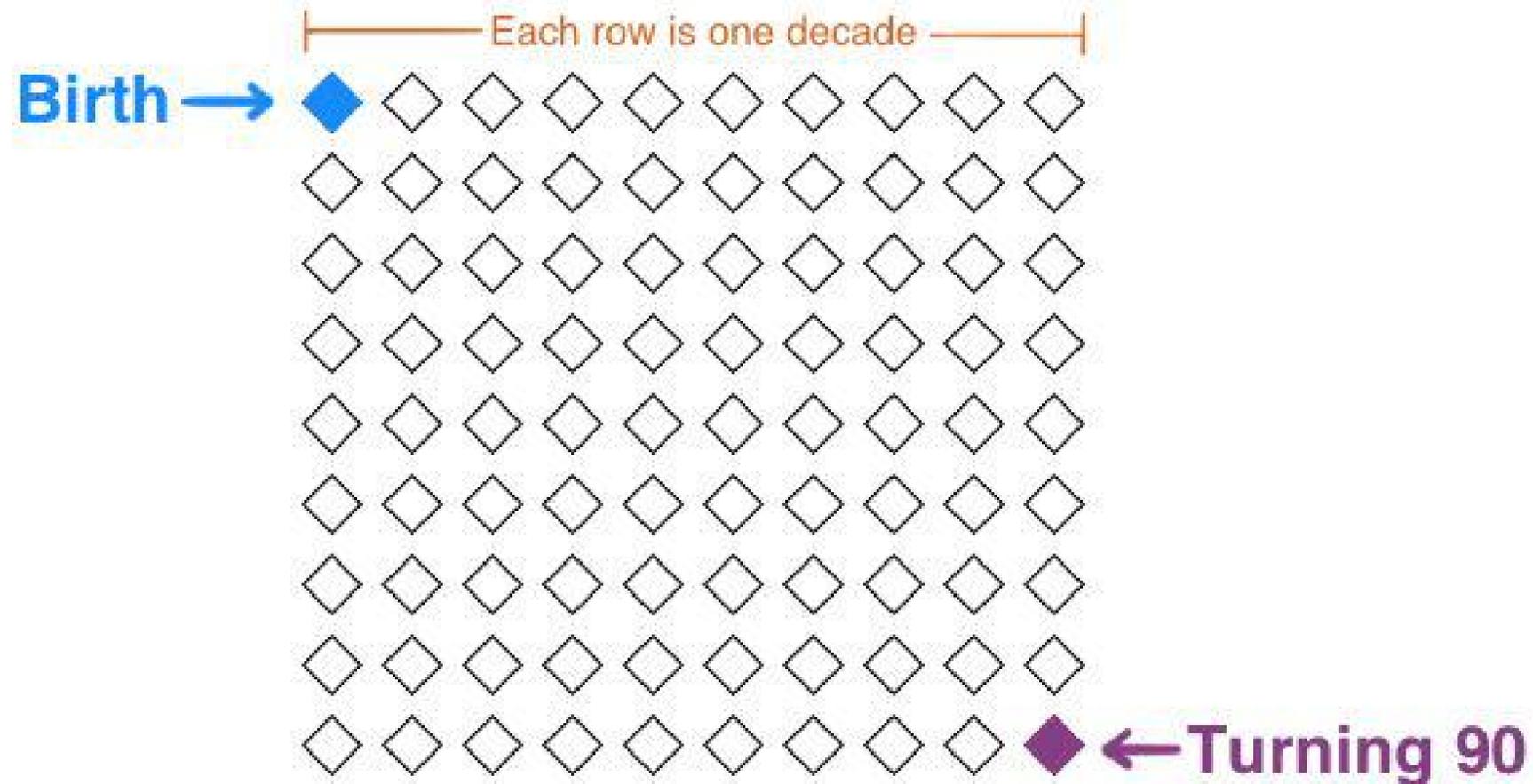
No one wants to die. Even people who want to go to heaven don't want to die to get there. And yet, death is the destination we all share. No one has ever escaped it, and that is how it should be, because death is very likely the single best invention of life. It's life's change agent. It clears out the old to make way for the new.”

— [Steve Jobs](#)



# Let's Show This Visually...

## A 90-Year Human Life in **Years**



waitbutwhy.com

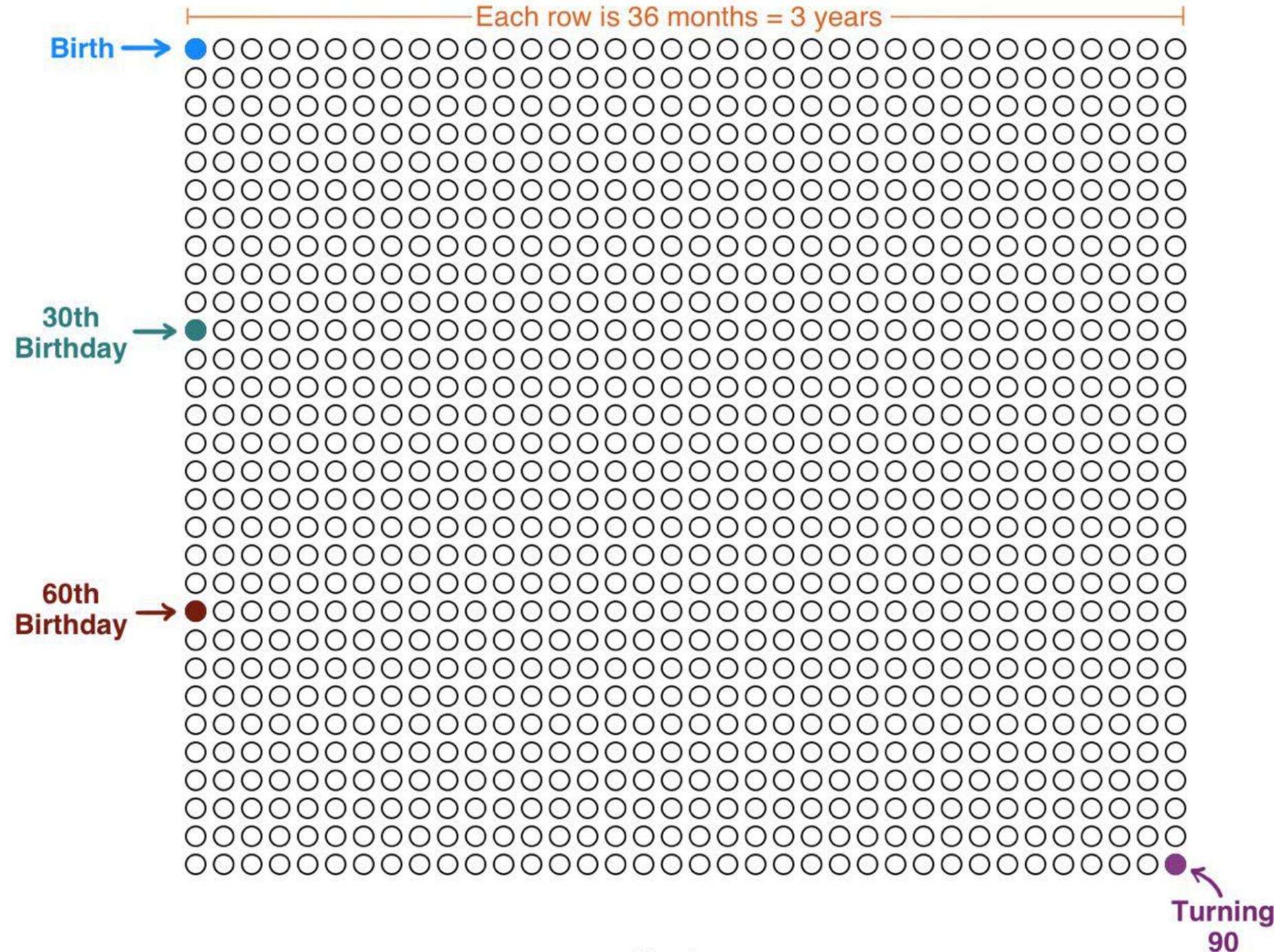
# Let's Make This Real...

Planning An  
**Epic Year**

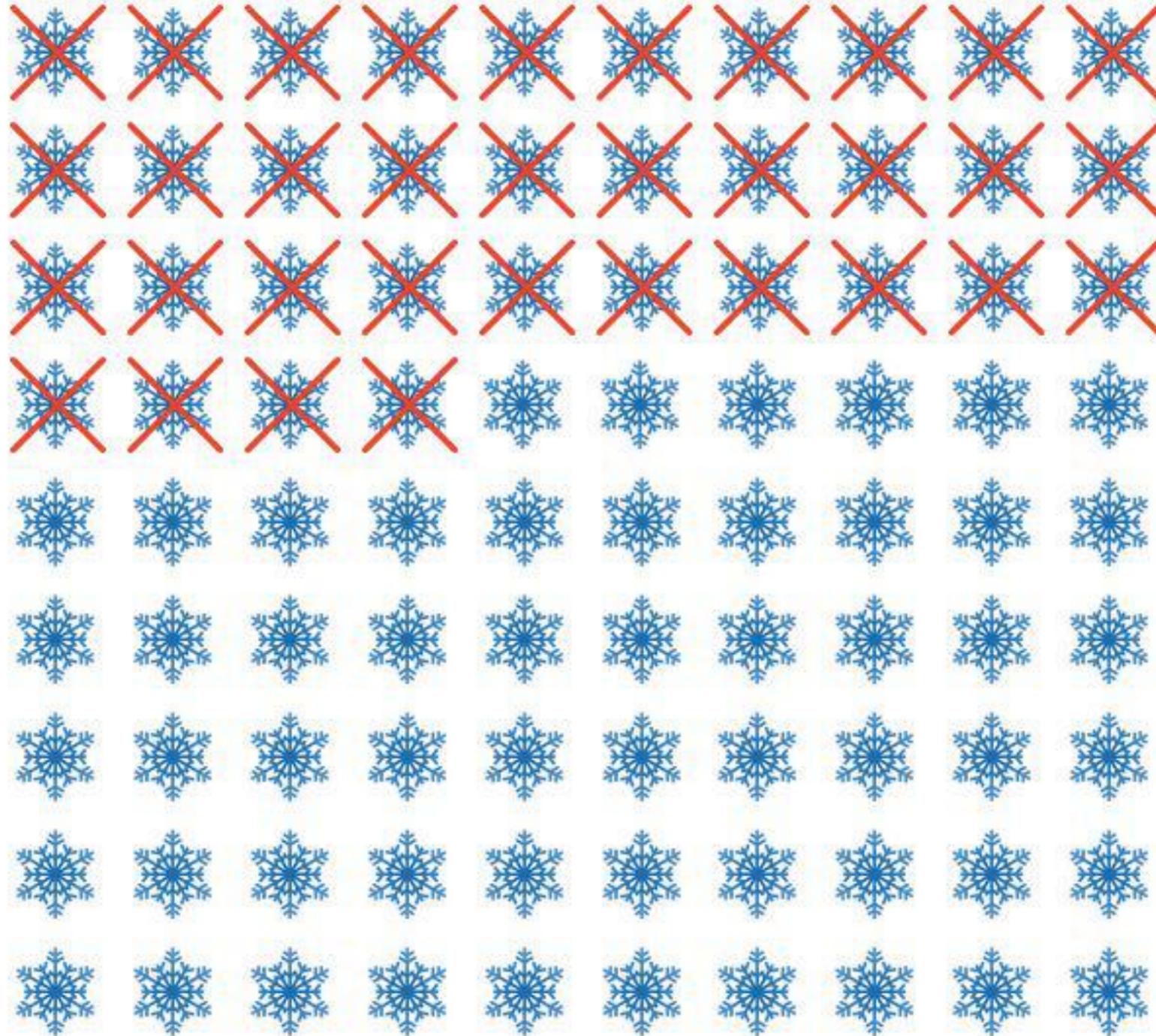


# Let's Show This Visually...

## A 90-Year Human Life in Months



# Let's Make This Real...



[waitbutwhy.com](http://waitbutwhy.com)

Planning An  
**Epic Year**

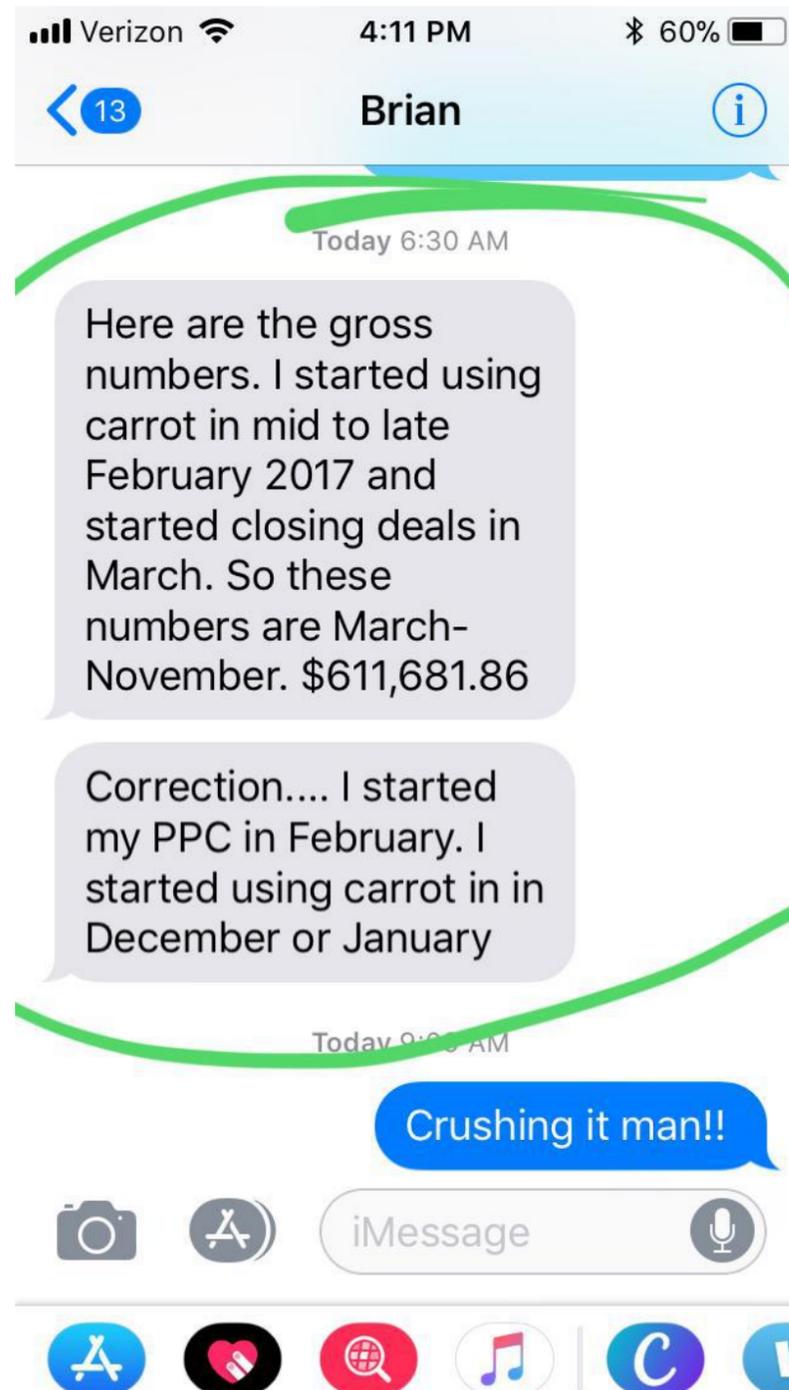


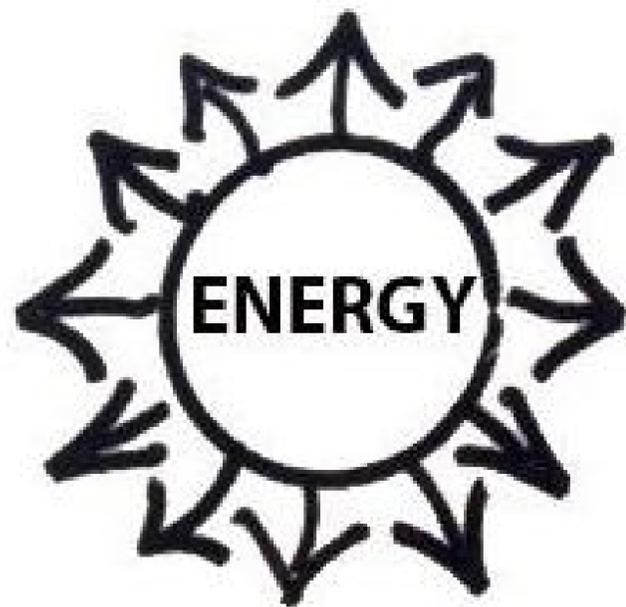
# Stacking Results...



**Brian Rockwell**

Dallas Texas



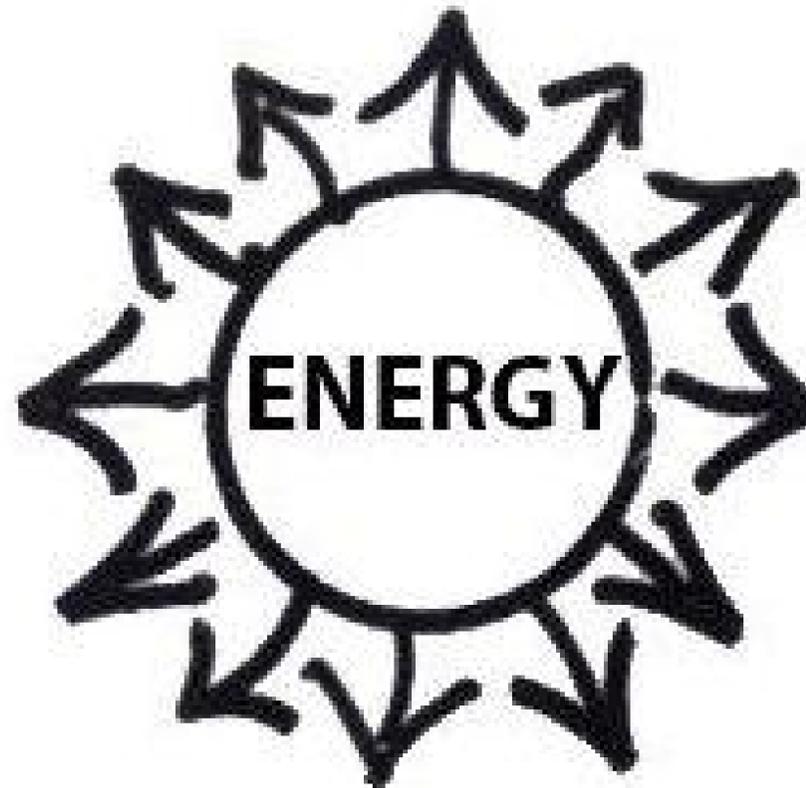


**Now, Since We Only Have  
One Go Around...**

... are you using your time  
wisely while you have it?

**Everything you “focus” on in  
2018 takes your mental energy  
and physical time.**

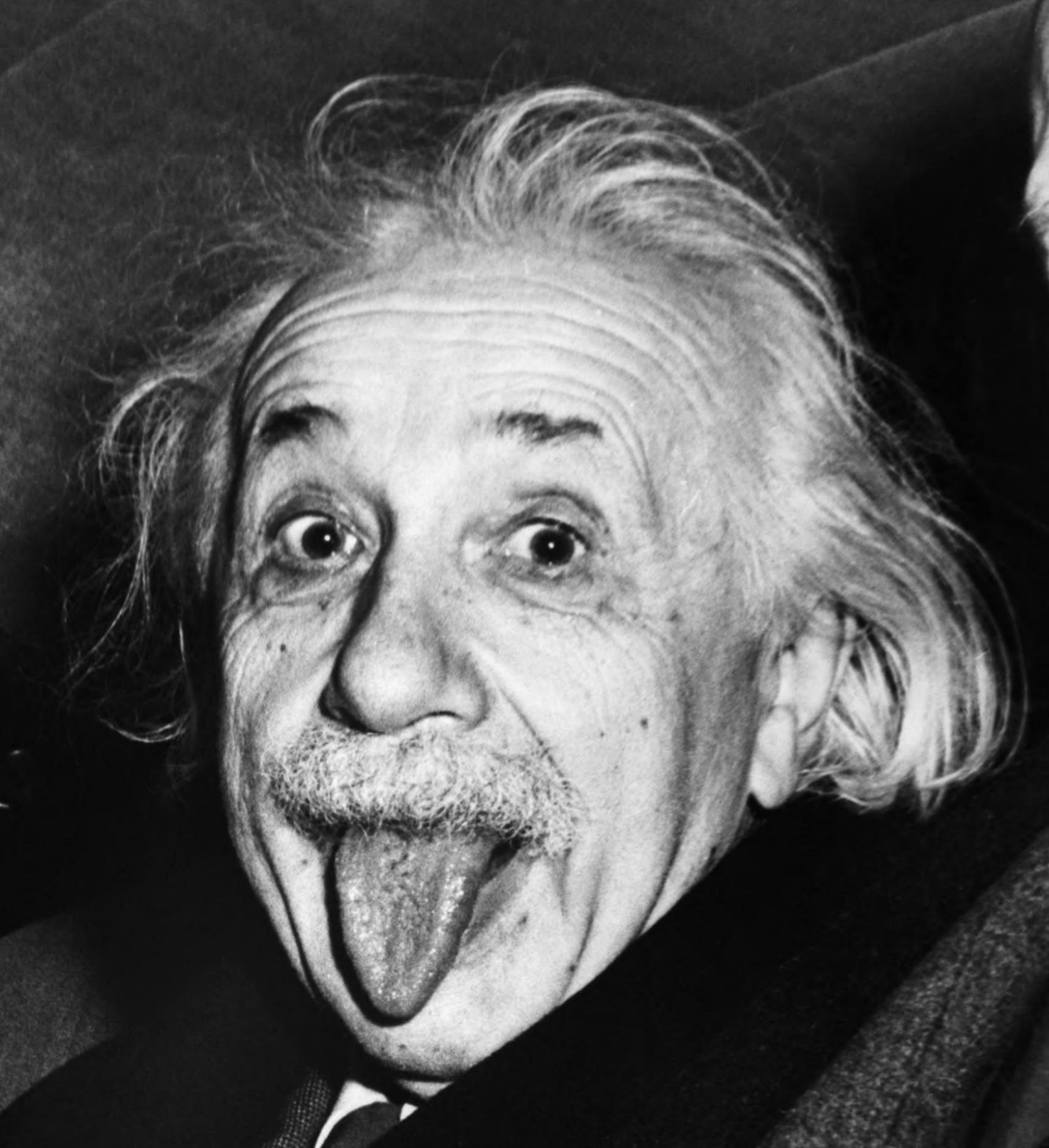
If you start and stop and spread  
yourself around...





**But when you put your energy into fewer things, but choose “less but better”...**

That’s when things start to blow up (in a good way) and take off in your life.



“  
We are most  
productive when we  
**focus on a very small  
number of projects** on  
which we can **devote a  
large amount of  
attention.**”

it's not who  
you **are**  
that  
holds you back.  
it's who you  
**think** you're  
**not.**

# The Biggest Saboteur...

## **2. Clarifying Your Lifes Vision**

**Planning your year is futile if you aren't clear what you want in LIFE.**

**DONT BE SO BUSY  
FOLLOWING OTHERS  
LIVES YOU FORGET TO  
BE THE AUTHOR OF  
YOUR OWN.**

**What's Your  
Vision Story?**

- Trevor Mauch

Planning An  
**Epic Year**



# 3. Drilling Down To The Annual Plan

As entrepreneurs we **NEED** momentum to be happy... crafting a clear Plan for the year helps keep momentum

A stack of cut logs is the central focus, arranged in a neat pile. The background is a misty forest with tall, thin trees. The lighting is soft and diffused, creating a serene atmosphere. The quote is overlaid in white text, and the author's name is in a red box.

Give me six hours to chop down  
a tree and I will spend the first  
four sharpening the axe.

Abraham Lincoln

# Take This Quick Test: The 5 F's

Write down a score of 1 - 5 (5 being you're crushing it)

**Fitness**

\_\_\_\_\_

**Family**

\_\_\_\_\_

**Friends**

\_\_\_\_\_

**Financial**

\_\_\_\_\_

**Faith**

\_\_\_\_\_

# Where Are YOU Going?

- Choose a big vision for the year

*“If you were to look back in 12 months at the year that passed, what would have had to happen in order for you to feel that year was a success?”*



# Your Annual Planning Sesh = Critical To Success

✓ Whiteboard notes >

✓ Notes >

✓ Management decisions for 2016 >

## Retreat Agenda:

✓ Review 2016 + Mind Expanding Shit (60mins - Trevor)  >

## Saturday:

✓ Next year of product goals / product vision (2hrs - Trevor start) >

✓ 2017 New Product Offerings (things not core to our software) >

✓ 2017 Marketing Initiatives >

✓ People - Ideal Roles / Gaps / Needle Movers >

✓ How do we lead and inspire our people in a great way? >

✓ 2017 Processes 2 ❤️ >

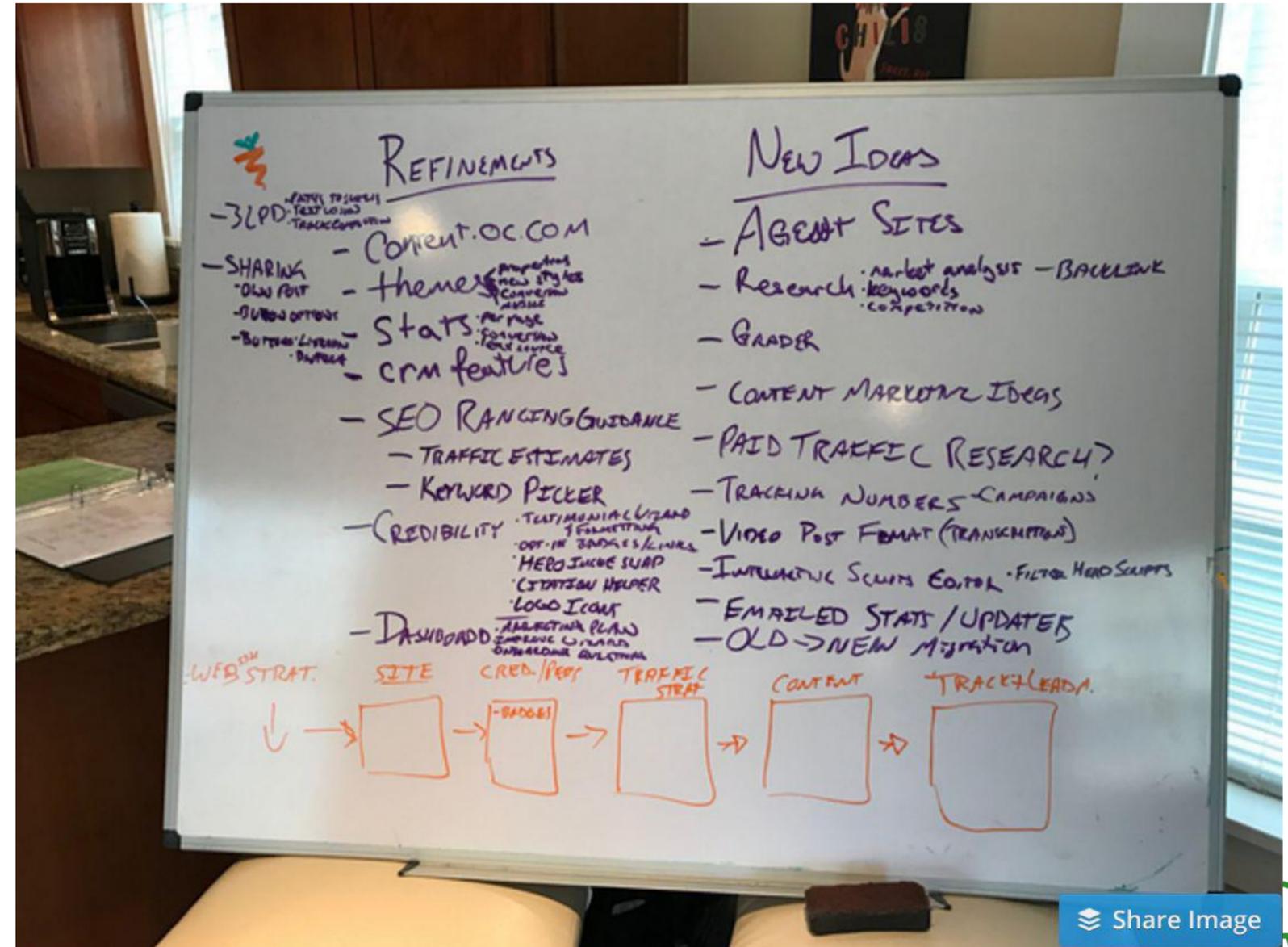
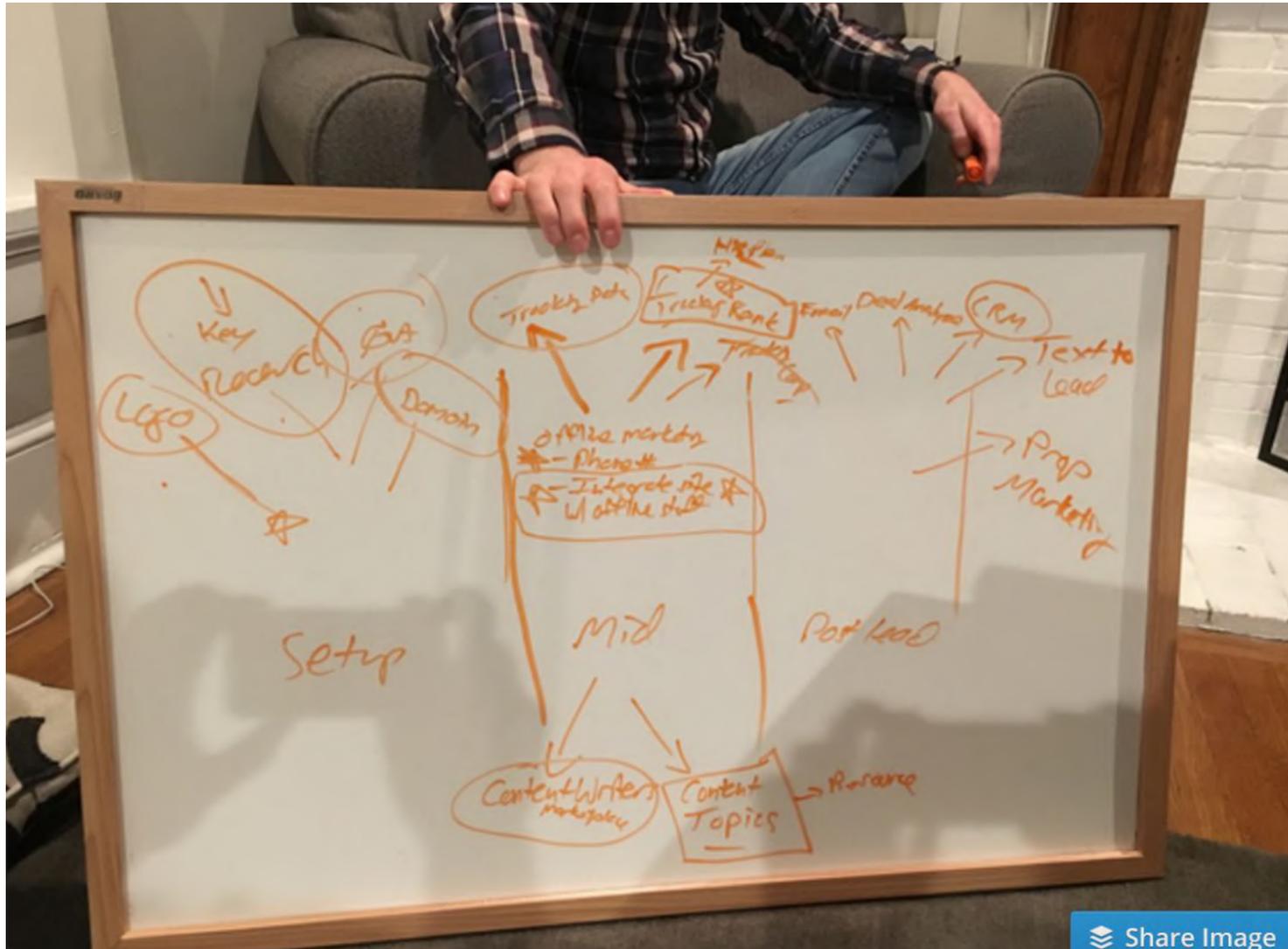
✓ Solidify Vision for Company 2017 and beyond >

✓ What are our 4 core competencies we need to nail in 2017? >

✓ Top Tier Plan Discussion >

# Get Brainstorming.

Mess Things Up. Then Build Back Up.



Share Image

Share Image

# Hold An Annual OFF-SITE Planning Retreat

Ideally, hold a **2 day off-site retreat** where you go through a process like I'm going to outline. Those 2 days are the **BEST** investment of those 2 days. Don't discount the value of this. It's **CRITICAL**

DAY 1: LOOKING IN THE REAR VIEW MIRROR...  
THEN EXPANDING YOUR THINKING

## Review

- How we do toward our **goals**? Budget vs. Actual
- Celebrate
- What **worked** ? What **didn't** (*frustrations, fail points, blockages*)?
- How did we do according to our Mission and Core Values?
- What are our **potential points of failure** that could take us down?

## Expand Your Mind

- 10x exercise

# Hold An Annual OFF-SITE Planning Retreat

## DAY 2: Planning The Future + Getting Specific

### Product **Vision** / **Goals** For Next Year

- What problem are we trying to solve?
- What do we want to be known for?
- What bottlenecks are in our way right now?
- What are the top 1-3 priorities?

### Any **NEW Product Offerings** (things not core to your primary thing)?

- Gaps?
- Opportunities?

### **People** / Gaps / Needle Movers?

- “If we could hire our dream person (knowing we can't get them, but hypothetically)... would that person help 10x the business (or reach whatever goal we have) if they are put in place? “
- How can we inspire our people even more next year?

### 2018 **Processes**

- Current **bottlenecks**?
- What processes **NEED** to be in place for us to succeed and build the business we'll enjoy

# Hold An Annual OFF-SITE Planning Retreat

## DAY 2: Planning The Future + Getting Specific

### Review **Vision** + Ask... “**Why**”?

- Are those goals we set actually important in the grand scheme of things?
- Why will hitting \$X in revenue *actually MATTER*? Or are we chasing numbers just to chase numbers and achievement?

### 1-4 **Core Competencies We Have To NAIL** In 2018

- Just list them. They go at the top of your goals for 2018 to set themes and focus areas.

... then take the notes and take pictures of things and put them into a simple “roadmap” of your priorities that you hang on your wall and review often.

# Recapping Our Planning Agenda

## Day 1:

1. Set aside time (1-2 days)
2. Review + reflect on the year
  - a. Goals vs. reality
  - b. Wins! + What caused not reaching goals
  - c. Opportunities and Threats (what could kill the business?)
3. Expand mindset (10x)

## Day 2:

4. Goals for 2018
  - a. Financial and other trackable goals
  - b. Should **EMBARRASS YOU** and be scary
5. What do we need to do?
  - a. People / gaps to fill?
  - b. Processes?
  - c. Projects
6. Theme:
  - a. What are the Core Focus areas to achieve that in 2018? (3-5)
7. Create visuals to get in front of people (After)

# Let's Get Personal...

- Jot down your intentions for the year on every important part of your life

*Health, business, relationships, education, financial, paying it forward, spiritual, pleasure and leisure*



# 4. Keeping Course During The Year

It's human nature to meander... to wander. It's the “bumpers”  
you put around you that help you stay on the right track.

# My 5 Step Process To An Epic Year





# Most people...

- Choose a big yearly goal
- Their goal / focus is kinda vague
- Only do their goal setting and “themes” once a year
- Give up on their goals by March

# What You Need To Do...

- Create a theme for the year

*Pick the #1 most important thing you want to live in 2018. For me, I've had themes like...*

*“To look back and KNOW I did the best I could possibly do on everything I did”*

*“Health and activity over everything else”*

*“Building something great with massive focus”*

*“Lead by example in everything I do”*

# What You Need To Do...

- Break it down into “90 day” chunks... Big Rocks

***Work your annual goals backwards and make them more achievable into Quarterly Missions.***

## CARROT VISION:

“Leverage our strengths and passions to help people cut through the clutter online and amplify results from their time and money invested in their marketing.”



### 2017 CORE FOCUS

Recruit & retain amazing people

Own content marketing for real estate

Reignite our industry leading data, testing and reporting

Empower our team with processes for success

Impact our communities through Carrot core values

## 2017 TEAM GOALS

### DEVELOPMENT

Content Marketing Features  
Dashboard Features  
AgentCarrot Features  
Team Growth

### MARKETING

Testing Systems & Reporting  
AgentCarrot & Higher Tier Plan  
Partnerships & Integrations  
Sales Process & Increase LTV  
Content Marketing Excellence

### SUCCESS

Improve Member Happiness  
Weekend & Phone Support  
Automate Strategy Guidance  
Build the Team  
Improve Services Division

### TEAM GROWTH

Hiring & Training Process  
Carrot Culture Team  
Startup Thought Leadership



# 2017 GOALS

Content Marketing Tool

Seamless Organization

High Performing Product

Healthy Core Business

World Class Customer Success

JUL	AUG	SEPT	OCT	NOV	DEC
AgentCarrot Beta ✓	AgentCarrot v2 planning ✓	IDX Research ✓	IDX Service	Onboarding Improvements, User Account UX	
Dashboard Features ✓	Chat Scheduling Reform ✓	CarrotCamp	AgentCarrot Feature Updates	Customer site optimization	Member Notes Dashboard
Demo Funnel ✓	SEO Ranking Recomm Resource & In-app ✓		Webinar Funnel Update	Help Center UX	Update Blog Design/Lead Gen
Update FB training + promo ✓	Video Post Transcription	Success/Services KPI Revamp	AdvMktr Discourse Community	Agent v2 Launch/Marketing	AdvMktr Domain Analysis Tool
	YouTube Channel Optim	Phone Strategy (Outbound, then Inbound)		Facebook Course Funnel	AdvMktr v2 Promo
			NPS Revamp	Team Member Training	End Of Year Promo
			Create + Track Sales KPIs	2018 Planning	

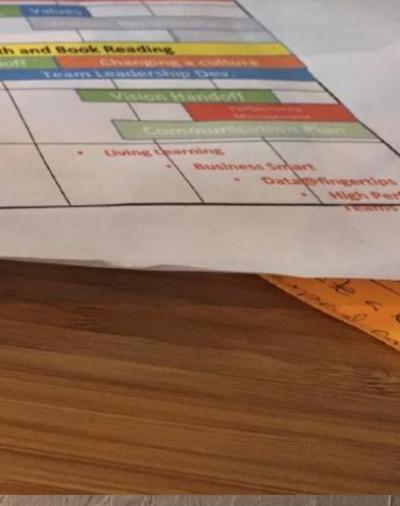
# What You Need To Do...

- Have a quarterly “out of office” 100% away from distractions



# 5. Winnig The DAY

Your environment shapes you. Shape your environment so  
are intentional about what you fill your mind with.



# Organizing Your Day

DAILY Work Schedule  
Date: \_\_\_\_\_

Phone Calls to Make		Comp	Personal Notes		Comp
1.	_____	<input type="checkbox"/>	1.	_____	<input type="checkbox"/>
2.	_____	<input type="checkbox"/>	2.	_____	<input type="checkbox"/>
3.	_____	<input type="checkbox"/>	3.	_____	<input type="checkbox"/>
4.	_____	<input type="checkbox"/>	4.	_____	<input type="checkbox"/>

Order of Priority	Time Allowed	Description – List of things to do now (High Importance; high urgency)	Comp
1.	_____	_____	<input type="checkbox"/>
2.	_____	_____	<input type="checkbox"/>
3.	_____	_____	<input type="checkbox"/>
4.	_____	_____	<input type="checkbox"/>
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6.	_____	_____	<input type="checkbox"/>
7.	_____	_____	<input type="checkbox"/>
8.	_____	_____	<input type="checkbox"/>
9.	_____	_____	<input type="checkbox"/>
10.	_____	_____	<input type="checkbox"/>

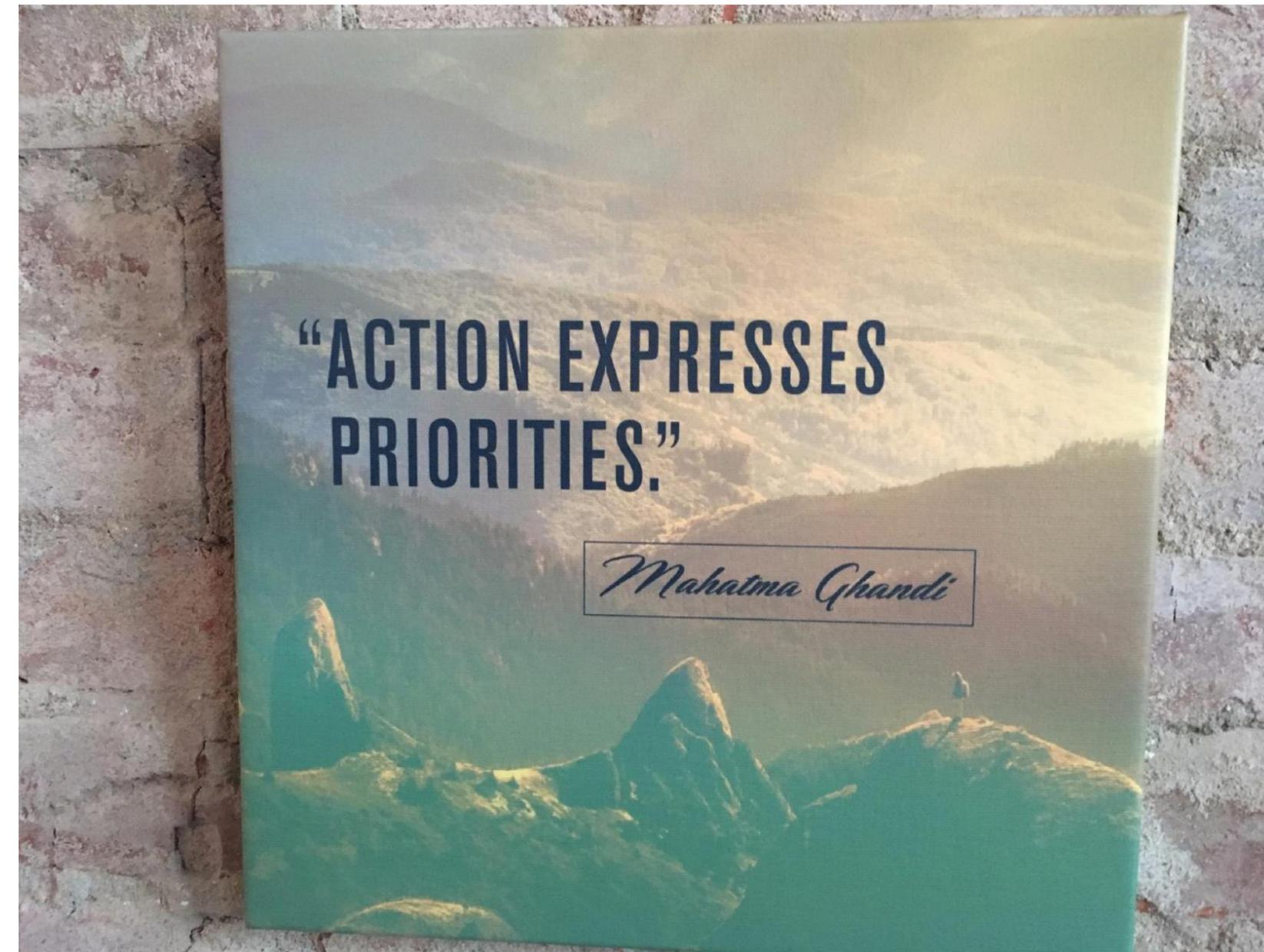
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<p>LIST OF THINGS TO DO (High importance; low urgency)</p> <table border="1" style="width: 100%;"><tbody><tr><td>1.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>2.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>3.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>4.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>5.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>6.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>7.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>8.</td><td>_____</td><td><input type="checkbox"/></td></tr></tbody></table>	1.	_____	<input type="checkbox"/>	2.	_____	<input type="checkbox"/>	3.	_____	<input type="checkbox"/>	4.	_____	<input type="checkbox"/>	5.	_____	<input type="checkbox"/>	6.	_____	<input type="checkbox"/>	7.	_____	<input type="checkbox"/>	8.	_____	<input type="checkbox"/>	<p>LIST OF THINGS TO DELEGATE (Low importance; high urgency)</p> <table border="1" style="width: 100%;"><tbody><tr><td>1.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>2.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>3.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>4.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>5.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>6.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>7.</td><td>_____</td><td><input type="checkbox"/></td></tr><tr><td>8.</td><td>_____</td><td><input type="checkbox"/></td></tr></tbody></table>	1.	_____	<input type="checkbox"/>	2.	_____	<input type="checkbox"/>	3.	_____	<input type="checkbox"/>	4.	_____	<input type="checkbox"/>	5.	_____	<input type="checkbox"/>	6.	_____	<input type="checkbox"/>	7.	_____	<input type="checkbox"/>	8.	_____	<input type="checkbox"/>
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# YOUR 5 Step Process To An Epic Year

1. **My Mindset Practices:** Your Biggest Asset / Enemy
2. Clarifying Your **“Life Vision”**
3. Creating **An Ironclad Yearly Plan**
4. Keeping **Course** During The Year
5. Crafting A **“Winning” Environment**



# START Leveraging Your Carrot System TODAY

You've got a powerful Inbound Marketing system at your fingertips... start leveraging it this week!

High Profit Portland Real Estate  
15-20% Annual Returns

See Our Local Fixer Upper Properties - FREE!  
Non MLS investment properties, many are under \$100k.  
First Name  
What Kind Of Buyer Are You?  
Investor  
Email  
SHOW ME THE DEALS!!

Banks Stop Calling When We Pay Cash!  
"We Can Make You A Fair Cash Offer and Close Fast!"  
Click To Continue <<

Need To Sell Your House Fast?  
We buy houses in ANY CONDITION. We pay CASH and you will not pay any commissions, agents, or fees. Put your address and email below and answer 5 easy questions on the next page to get a cash offer in 24 hours!  
Property Address \*  
Phone \* Email \*  
Click To Continue <<

See Our Local Fixer Upper Properties - FREE!  
Non MLS investment properties, many are under \$100k.  
First Name  
What Kind Of Buyer Are You?  
Investor  
Email  
SHOW ME THE DEALS!!

you about making an offer to our special report, "How To Market".  
can buy your house. We'll work with you to pay cash, and close quickly.  
of estate buyers. We sell your house fast.  
to make offers on all types of real estate.  
offer within 30 days.  
no fees and no commissions. (This equals  
more money in your pocket.)  
• We give you the right information to help you make the decision best for you!  
Complete the form to the right and access our inventory of homes, set up a no obligation consultation to help you find your next home, and claim your FREE special report.

ABC Properties was a breeze to work with. I was looking for properties in Portland on my own and through agents for over a year with no luck. Once I connected with ABC Properties, within 3 months I bought a property that now cashflows \$800/mo. I'll definitely be buying more from ABC Properties - Mark Bruff Portland, Oregon

Looking For High Profit Residential Or Multi-Family Portland Investment Properties?  
ABC Properties has been sourcing deeply discounted and high profit properties in the Portland, Oregon area for the past 5 years... and passing those savings to investors looking to buy and hold.  
if you're looking for...  
• Turn key properties complete with tenants and management  
• Instant equity  
• Positive cashflow from day one  
• No hassle and an easy "property shopping" experience...  
... just connect with us and see our inventory by entering your information in the box to the right

  
[www.onCarrot.com/account](http://www.onCarrot.com/account)  
investor  
An  
rrot  
near