

Planning an...

EPIC 2024

*Growing through the pain lines in business and life to become
the person you were put on earth to be.*



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



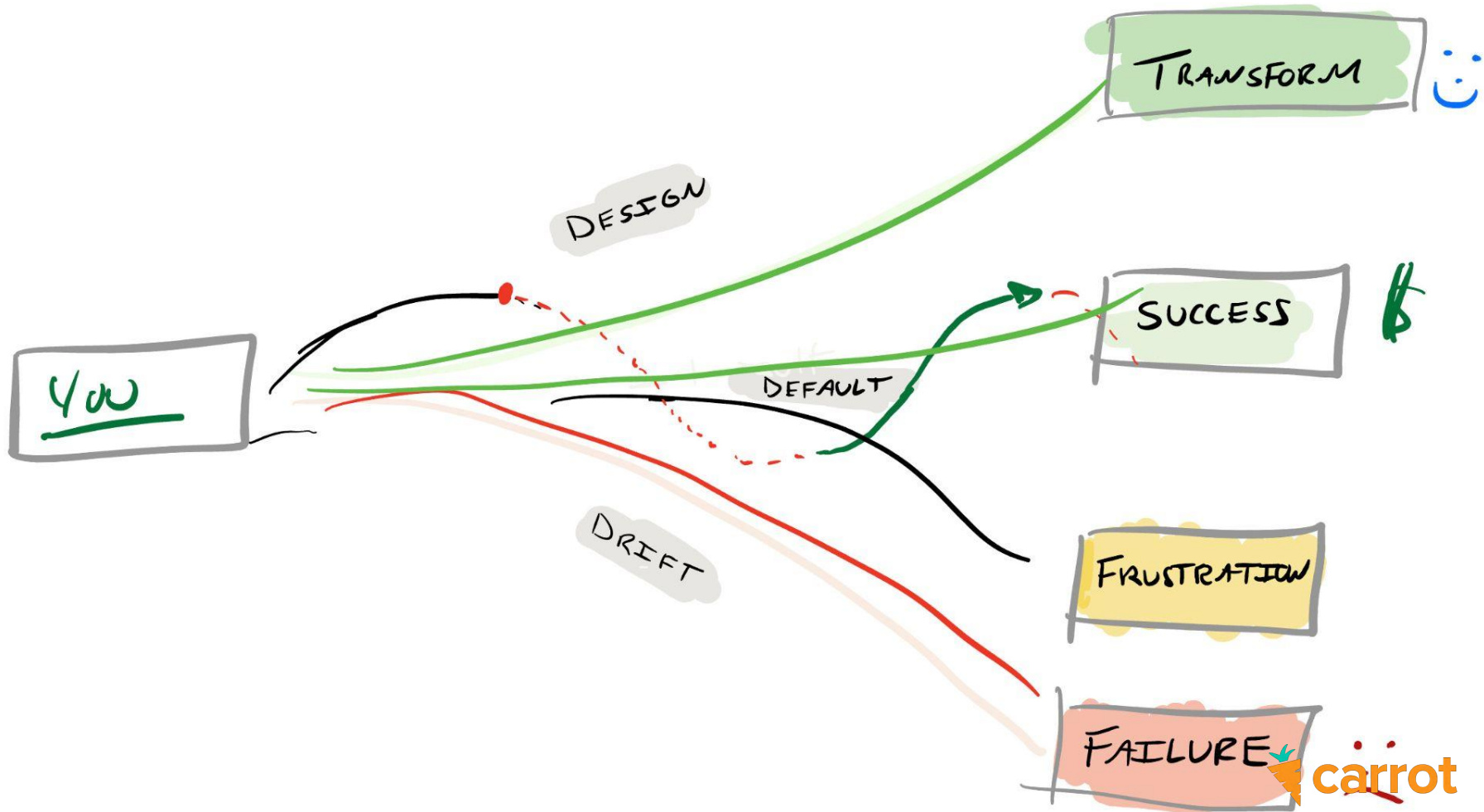
The Future Rewards Are Always There Waiting for Us

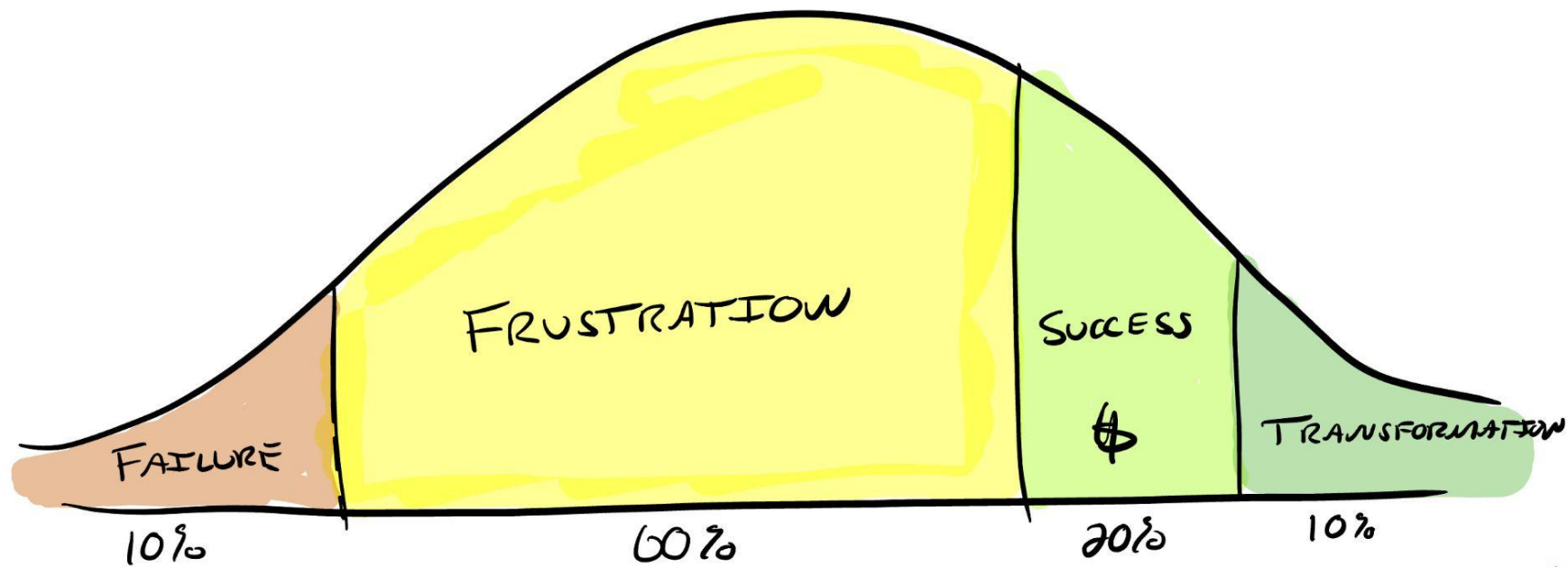
YES
As certainly as we once dreamed, we can dream again. As surely as we once believed, we can believe again. No matter where we are right now, we still have the ability to change it all.

The journey toward success is a journey of a thousand steps, and it begins with a single book or a single promise finally kept. It begins with the awakening of our sleeping spirit brought on by dreams of all that could be.

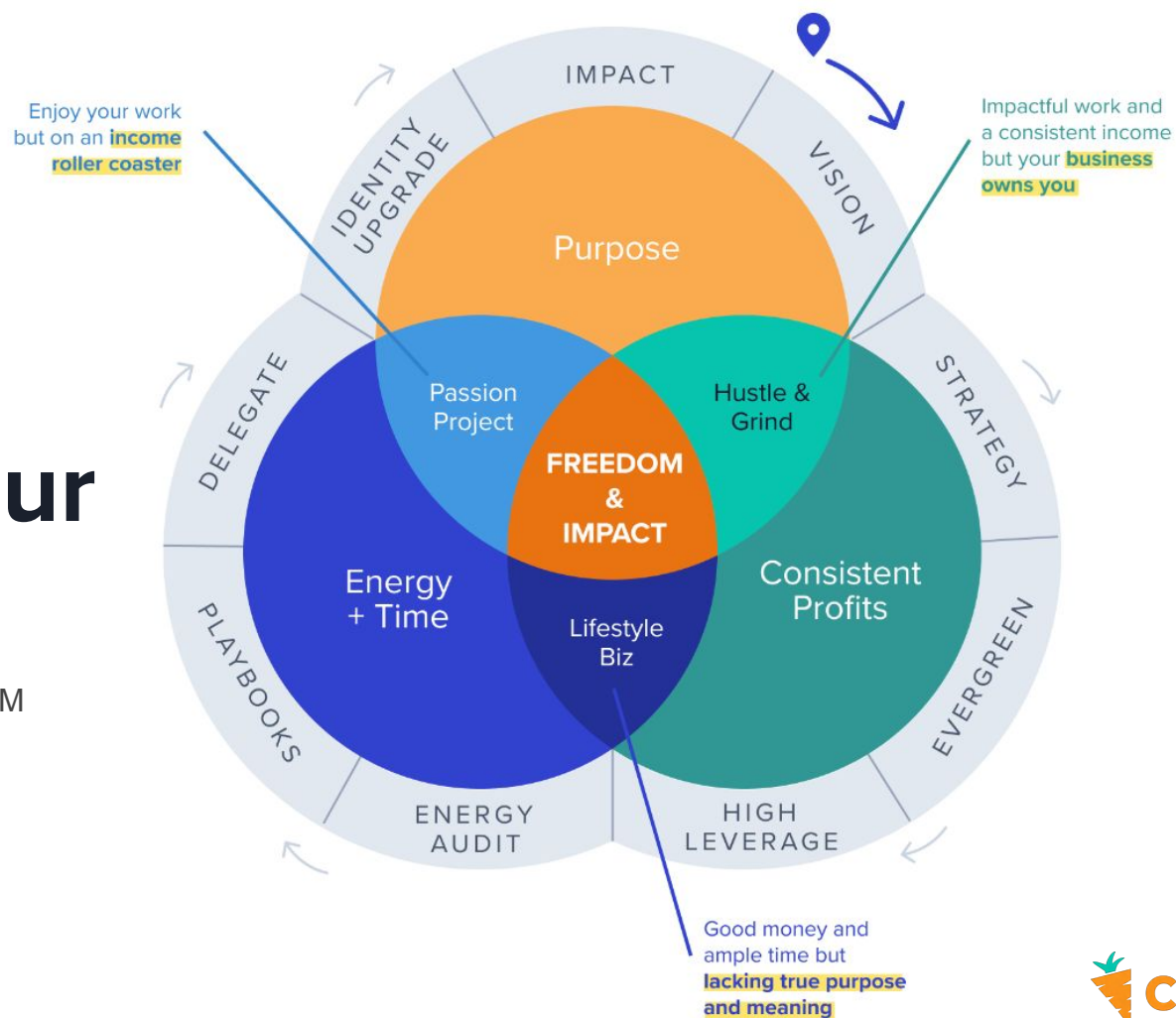
Any day we choose we can stand up and take that first step on a journey that can lead us to a new and better way of life. We must not expect the results merely because we have begun the activity, but with continued effort and certain steps will surely come our future rewards.







The Entrepreneur Freedom Formula™



Identity is this incredible invisible
force that controls your whole life.
It's invisible, like gravity is invisible,
but it controls your whole life.

Tony Robbins

You're in the right place if you...

- Keep **chasing the next goal or achievement** but find it never brings lasting joy or fulfillment... and ***you know there's got to be more to life***
- ***You've already achieved your "someday goals" you set years ago... but still not as happy and fulfilled as you thought you'd be***
- OR... you feel like ***you're working your butt off but not getting closer*** to your ultimate goals (*or your goals keep shifting*)
- ***Every year you have the same goals*** you set, then re-set... and have thought "Maybe I should aim lower" or "Maybe it's just too hard for me"
- You want **a better system for setting and achieving goals** that sets you up for success in the new year and

You're in the right place if you...

- You dip into “Entrepreneurs Funk” but don’t know how to get out
- You’ve been **grinding for months (maybe years)** and things just don’t seem to be breaking through for you...
- Start each day ***feeling overwhelmed at everything you have to do*** and the little time you have to do it
- **You keep hitting up against a wall** and can’t crack through to reach your Vision for “success” and are getting discouraged...
- You want to find ways to **create more happiness and joy** in life and business



Trevor Mauch

- Founder and CEO of **Carrot**
- Inc 500/5000 **Fastest-growing companies**
2017, 2018, 2019, 2020, 2021
- Fastest growing software company in Oregon 2018, 2019
- **#8 Most Philanthropic Small Business In Oregon**
- 50+ Full-time team members at Carrot
- Re-Develop historical buildings
- Husband, Father of 3, and Investor
- Passionate about **amplifying leaders** and entrepreneurs to **make YOUR greatest impact**



“Time offers opportunity but demands urgency”



Thoughts on urgency...

Why when someone seems serious about making these changes, they roam aimlessly in circles not making progress? It's comfort. You have a house, a car, your bills are getting paid, etc. **You're in the COMFORT ZONE.**



Thoughts on urgency...

Lack **desperation** or **inspiration** to drive us forward
(running away, or running toward)

Thoughts on urgency...

When in comfort zone **it affects our hearing**. We stop hearing the ticking clock n think we have all the time in the world, and unwittingly squander the present moment. Scrolling, watching TV, etc. use for entertaining ourselves rather than preparing ourselves.

Thoughts on urgency...

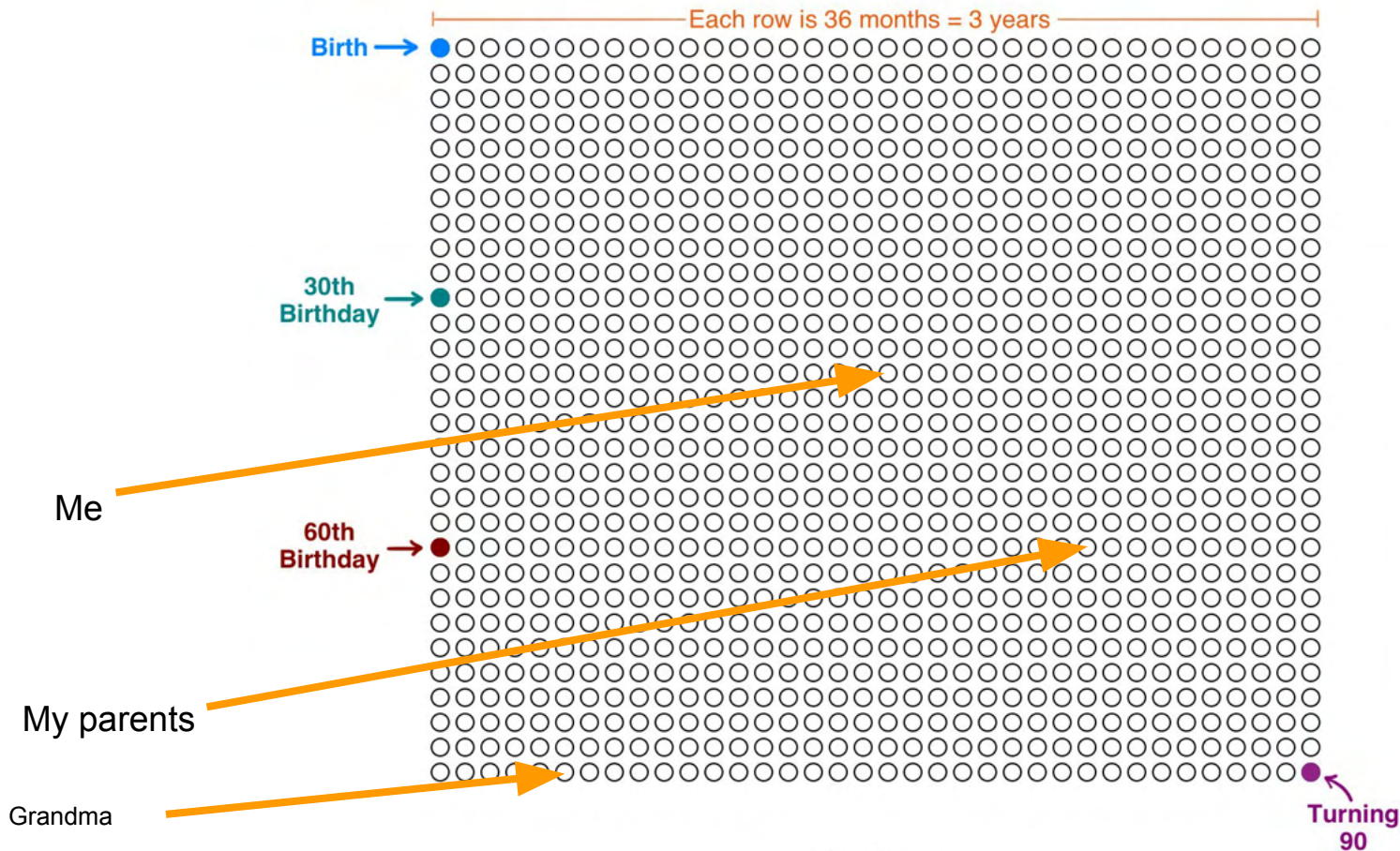
Without urgency... the next week, month, year, and decade may be wasted... just like the past week, month, and year before it.

Thoughts on urgency...

We must impose upon ourselves a new discipline and develop a new attitude about life that **motivates** us **AND INSPIRES** before we self-sabotage and slide backwards. When that happens, urgency is naturally created because it turns into an emergency.



A 90-Year Human Life in Months



What we'll dive into today...

- **My '23 in summary + my top 3 books of the year**
- **My 3 biggest learnings / mindset shifts of 2023**
 - **Pain lines are real.** Growing through them requires internal change first
 - **10x is easier than 2x.** Want vs. Need based motivation
 - **Change is about identity... NOT habits**
- **Planning An Epic 2023**
 - My **EPIC Personal Goal Planning** Template
 - My 1 Page Business Plan Template
- **LIVE Coaching and Q&A**



My Annual Personal Planning Template

2 Diagnose where you want to grow:

Awesome! Now let's see where you want to grow. This is your chance to be brutally honest and raise your standards in every aspect of your life.

“If you sincerely want to change your life:
RAISE YOUR STANDARDS...

—TONY ROBBINS

→ The 7 “Fs” Exercise

Score yourself on a scale of 1–5: **1 meaning you're failing miserably and 5 meaning it couldn't get any better.** *Honesty here is key.*

CATEGORY

SCORE

- | | | |
|-----------------------|--|--------------------------|
| Faith | How are you doing on your spiritual walk? | <input type="checkbox"/> |
| Family | Are you showing up the way you want at home with your spouse, kids, parents, etc.? | <input type="checkbox"/> |
| Friends | How rich are your friendships? Are you building deep relationships with friends? | <input type="checkbox"/> |
| Fitness/Health | Without your health all the money in the world doesn't matter. Are you active daily and eating well? | <input type="checkbox"/> |
| Finances | Money can add security and open up opportunities to improve more and explore. How secure are you in your finances? | <input type="checkbox"/> |
| Fun | Are you creating the space to have fun? Too often we get caught up in goals and forget to have fun. | <input type="checkbox"/> |
| Learning | Are you on a path of learning and growth or stagnant? | <input type="checkbox"/> |

Discipline Unlocks Freedom and Impact

Crafting the Disciplines to Transform Your Life

In life we have periods of growth, periods of being stagnant, and times when we're going backwards. Almost every time we feel like we're hitting a growth wall it's because of 2 things:

First, you've run out of vision. You're not clear where to go.

Second, you've hit a discipline ceiling. Your current disciplines and habits can't get you past where you are. A clear vision (what we worked on above) and new disciplines will unlock your next level of growth.



→ What habits and disciplines would your ideal self have you currently don't?

_____	_____
_____	_____
_____	_____

It's not IF we'll meet trials... ... but when. How we react matters.



“Count it all *joy when you meet trials* of various kinds... for the *trials produce steadfastness* and let that steadfastness make you perfect and complete lacking in nothing” - *James 1*

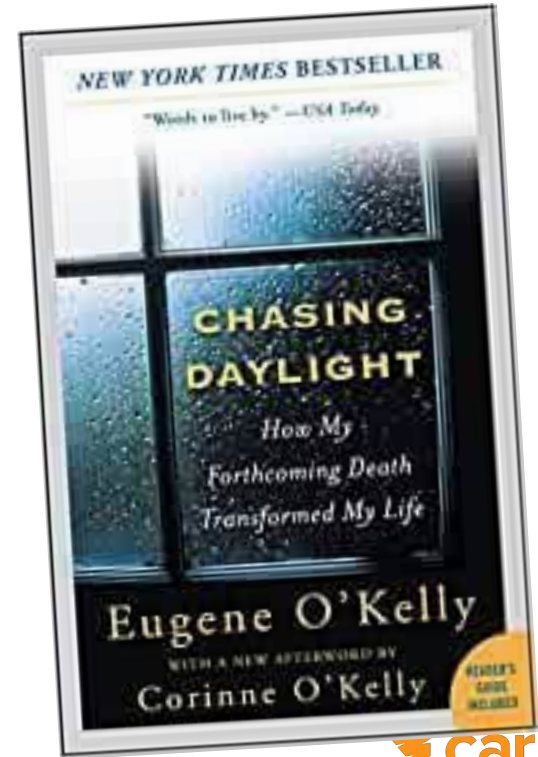
My '23 in review...

Growing as a **leader** and more clarity
on my **personal vision**

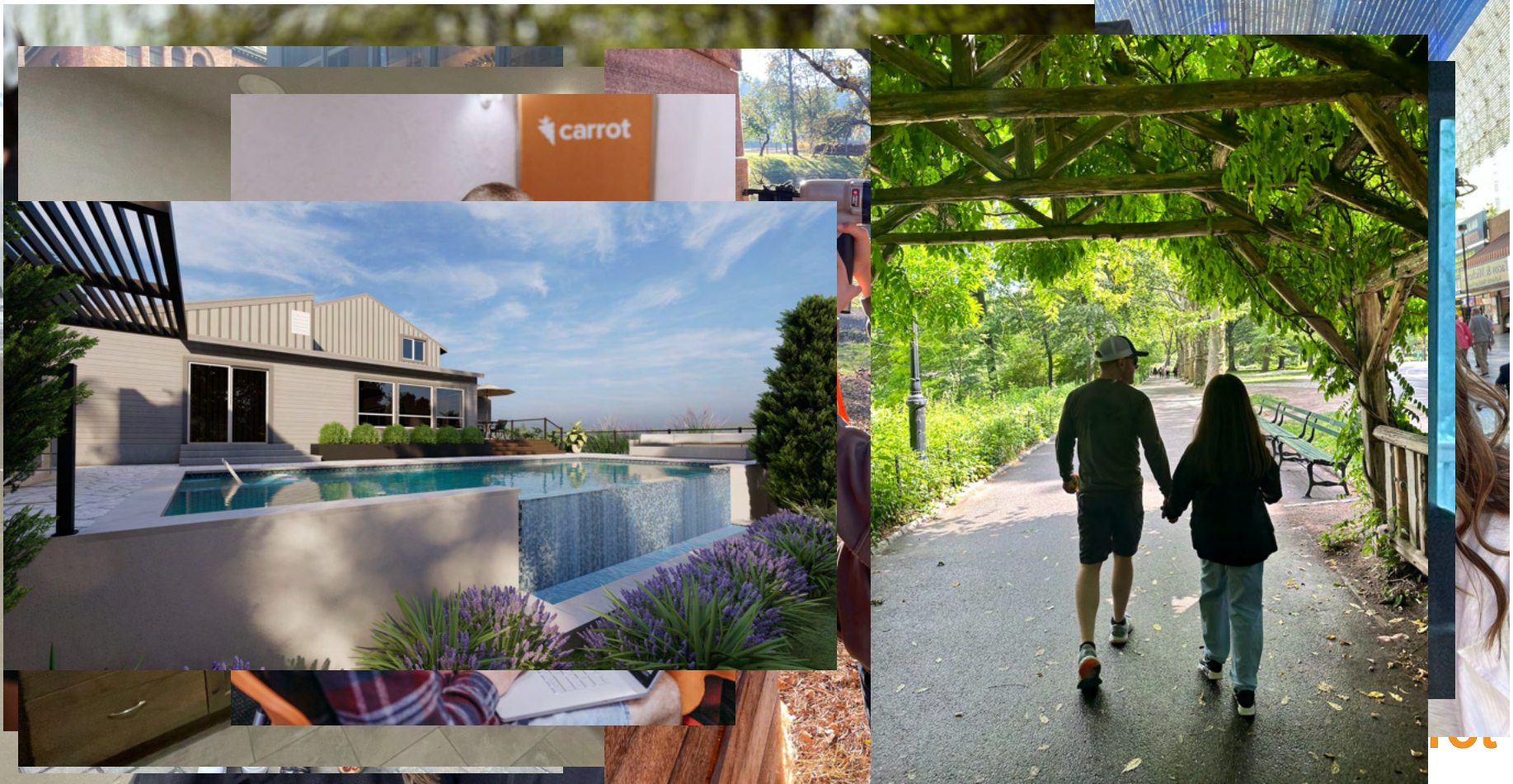
Creating Magical Moments

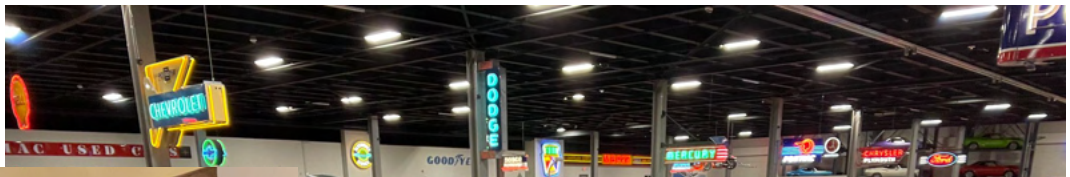
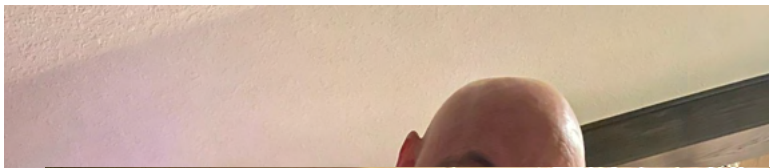
“Perfect moments more often make time stretch out and the years become more fruitful. Time slows down, senses arouse, everything in those moments is just right.

These moments are what makes life sweet. Busyness makes having perfect moments hard. Examples, a shared glance, letters to loved ones, phone calls, walks in the park, fabulous meals, and intimate conversations.”



Faith, Family, Friendships, Fitness, Finances, Fun





Ways I'm creating more Magical Moments...

... with my wife

... with my kids


... with my family

... with my friends

My 3 Biggest Mindset Shifts Of 2023:

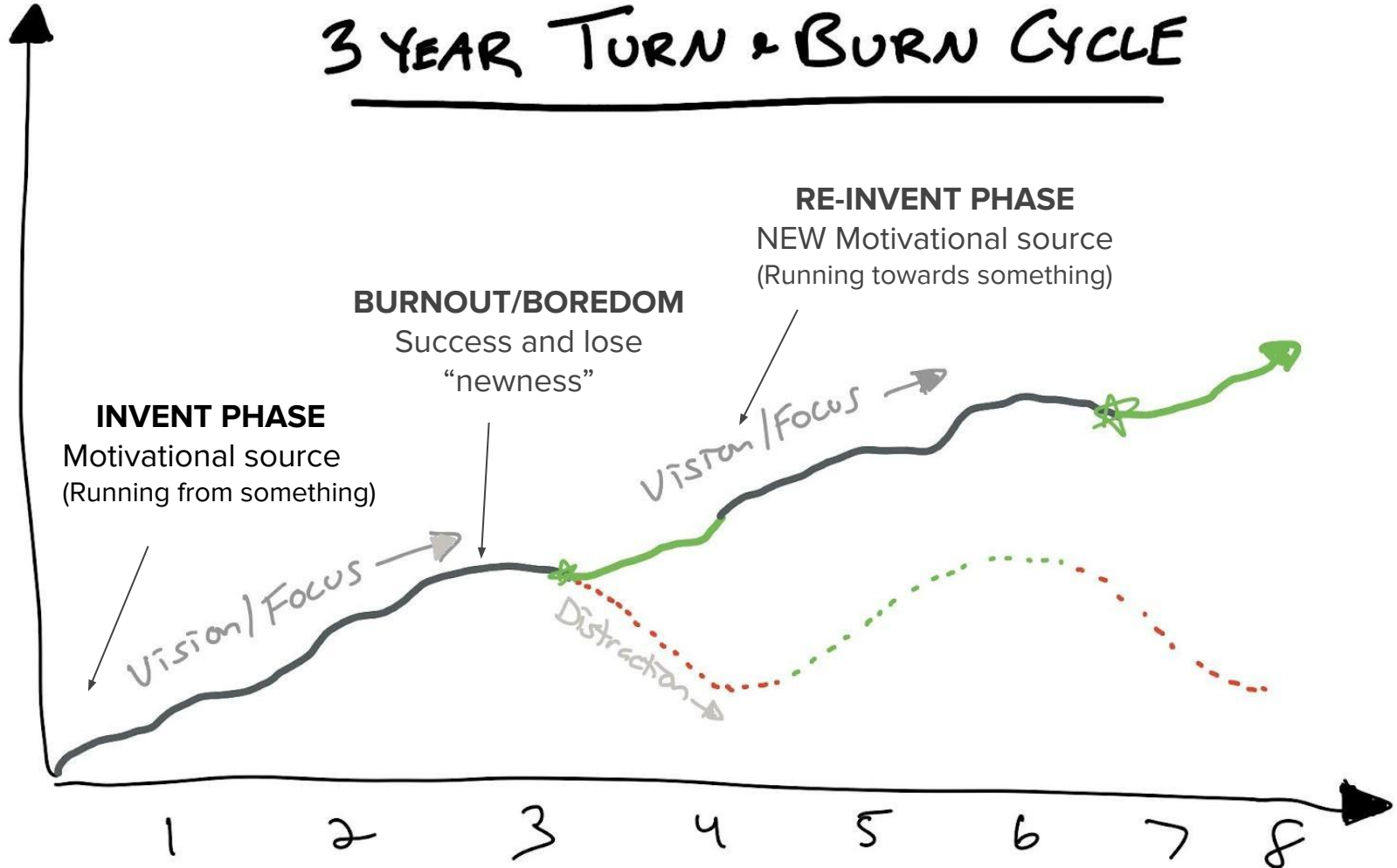
Mindset Shifts of '23

1. Pain lines are real

An illustration in the top right corner showing a stylized hand in orange holding a pencil. The hand is positioned as if about to write. The pencil has a blue eraser and a teal body.

**The reason you may not
have the business of your
dreams today, is because
you're not capable of
running it right now.**

3 YEAR TURN & BURN CYCLE



The “Rule of 3 and 10”

“Things break and challenges amplify at 3’s and 10’s in revenue”

\$100k-\$300k	Delegate <u>tasks</u> to duplicate low level work you do (EA/VA)
\$300k-\$1M	Delegate <u>projects</u> to scale delivery of marketing/sales/transactions (marketing agency, lead manager/acquisitions, dispo)
\$1M-\$3M	Scale to 2nd market OR expand marketing channels in single market. <u>Add more capacity</u> where capacity is needed (managers)
\$3M-\$10M	Delegate <u>results</u> to leaders who can execute a plan and be accountable to results (directors/VP)
\$10M-\$30M	Delegate <u>strategy</u> to executives who can elevate and amplify (VP/C-level)



The Business Growth Levels

LEVELS	1		2		3		4		5		6	
REVENUE	\$0 - \$100k		\$100k - \$300k		\$300k - \$1M		\$1M - \$3M		\$3M - \$10M		\$10M - \$30M	
TEAM	You + VA + MENTOR		+ EA + Agency		+ LM/TM + Sales		+ Managers +		+ "Head of"		+ C-level execs	
PAIN LINE	MINISET Flipping your risk profile + NO plan B.		TIME MANAGEMENT Mastering personal productivity habits		DELEGATION Accomplishing tasks through others		SCALE PROCESS Documenting a scaling repeatable delivery		LEADERSHIP Driving consistent results through others		STRATEGY Hiring independent builders + true execs	
IDENTITY	DREAMER		RUGGED INDIVIDUALIST		★ PERFORMER		★ BUILDER		★ LEADER		VISIONARY	
PURPOSE	REPLACE YOUR W2 INCOME		GO FULL TIME		CONSISTENT INCOME		FREEDOM		IMPACT		LEGACY	
VISION	MOVE AWAY FROM PAIN		STAY AWAY FROM PAIN		MOVE TOWARDS PURPOSE		SELF MANAGING BUSINESS		SELF MANAGING BUSINESS		BUILDING YOUR EMPIRE	
STRATEGY	PICK 1 MARKET + 1 DEAL TYPE		MASTER YOUR MARKET		1 MARKET HYBRID / MULTIPLE EXIT STRATEGIES		BUILD EVERGREEN INCOME		MULTIPLE MARKETS		VERTICALLY INTEGRATED BUSINESSES	
MARKETING	HAMSTERWHEEL OFFLINE + START EVERGREEN		FIRST PAID CHANNEL		STACK THE NEXT CHANNEL		OMNI CHANNEL		SCALE OUTBOUND		MARKET SATURATION	
LEVERAGE	REAL ESTATE COACH		ADD CRM + PAID MARKETING (PPC)		MASTERMIND		TEAM		LEADERSHIP COACH		SCALE	
ENERGY	LEARNING		MASTERING SKILLS		REST / PHYSICAL		THINKING TIME		CREATING YOUR ART		CONNECTING	
PROCESS	LOOM TASKS		KPI'S SCORECARD		MARKETING + SALES PROCESS		HIRING + CADENCE		BUSINESS PLAYBOOKS		SCALE DECISIONS	
DELEGATE	LOW-LEVEL REPEATED TASKS		ONE MARKETING CHANNEL		REPLACE ↓ ENERGY \$ MAKER		PROJECTS		REPLACE RESULTS		REPLACE STRATEGY	

When we're in pain we tend to do one of these 3 things...

Sabotage

Settle

Sell



Energy Audit

Name: _____

Date: _____



Use this energy audit at least quarterly to continually shift more and more of the things you do in life and work towards your Unique Abilities... the things that you're great at and GIVE you more energy when you do them. A fulfilled life and high energy work can't happen without over 50% of your activities being "energy activities". The highest performers operate in the 70%+ energy range on a weekly basis. For the full tutorial on this process visit: oncarrot.com/energy

Gives Energy

% _____

Drains Energy

% _____

► Circle 1–3 "draining" activities on the right that you want to stop doing, add up how many hours per week they currently take, and work on eliminating those from your life over the next 3 months... replacing them with more time to do an Energy Activity on the left. **Each quarter your Energy Ratio should climb higher towards more energy activities.**

Grow through your pain line...

First, recognize you **CAN grow** through this

Where do YOU need to grow before your business will?

What do you need to **delegate** next?

Who is your **right next hire**?



Mindset Shifts of '23

2. 10x is easier than 2x

“The only way to make your present better,”
said Dan Sullivan, “is by making your future
bigger.” Going 10x means you're living based on the most intrinsic and exciting future you can imagine. That 10x future becomes your filter for everything you do, and most of your current life can't make it through that 10x filter.



Remember
when you wanted
what you
currently have.

2x

vs.

10x

FUTURE

PRESENT

↑ ↑ ↑ ↑

PAST

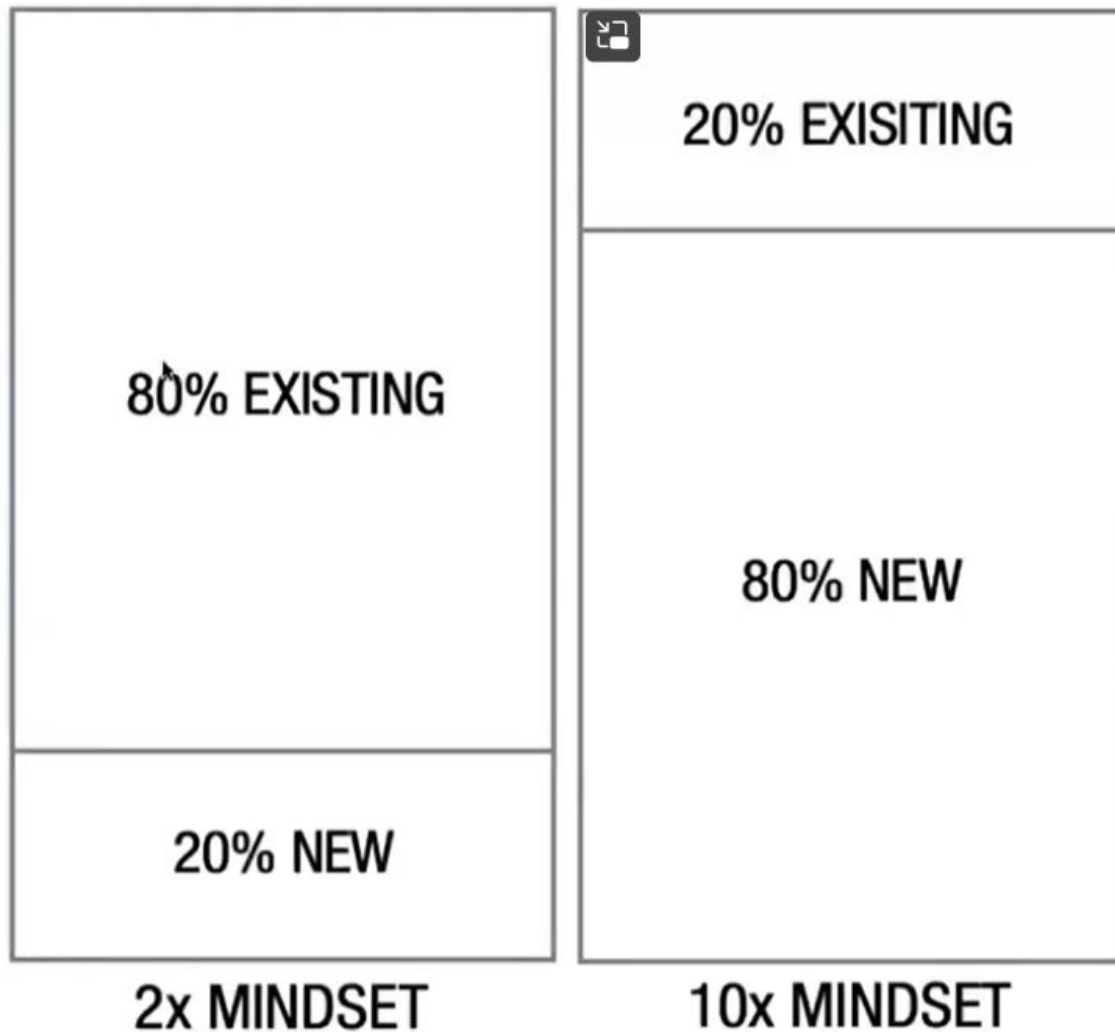
- Uninspiring
- Doesn't Move Needle

FUTURE

PRESENT

PAST

- Vision Driven
- Future pulls forward



“Need” vs. “Want” based motivation

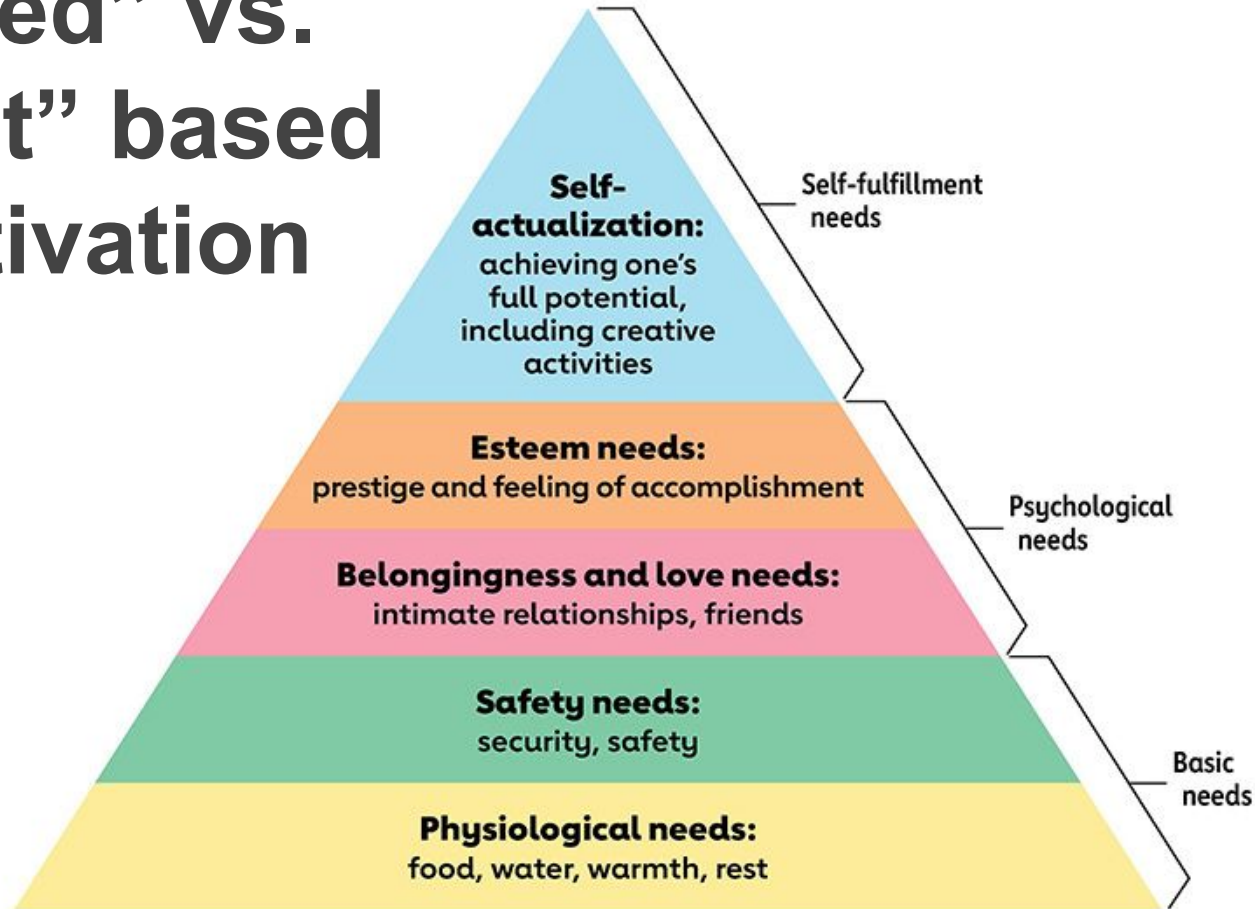


Image Credit: SimplyPsychology.org/Maslow, 1943

What's your **big exciting vision**?

If you knew you couldn't fail, what do you want more than anything else?

Remove the “how”, just envision the what and the why



Mindset Shifts of '23

**3. Change is about
identity NOT habits**

CRAIG GROESCHEL
NEW YORK TIMES BESTSELLING AUTHOR



THE
POWER
TO
CHANGE

Mastering the Habits That Matter Most

We all focus on adopting “new habits” and hope they will stick.

But why don’t they stick?

It’s simple (*but not easy*).

Who before Do.



IDENTITY → A → H → D → **OUTCOME**

WHO

DO


MOMENTUM

DEFAULT

WHO

*AUDIT +
VISION*

INTEGRATE

The background of the image is a photograph of the interior of Antelope Canyon, showing smooth, undulating sandstone walls illuminated by warm, orange light. A bright opening at the top center allows natural light to stream in, creating a dramatic silhouette effect and highlighting the textures of the rock.

When you accept the fact that
your true identity includes being
an overcomer, you will never
settle for less than a miracle.

Craig Groeschel

“ quote fancy

What's your “**who**”? Who do you want to become?

What traits do you want to embody in your life?

Who **do you look up to** and aspire to be more like? Why?

What new **daily non-negotiables** will you adopt?

Who do you want to **surround yourself** with this year?



**SOMEONE ONCE TOLD ME
THE DEFINITION OF HELL:
THE LAST DAY YOU HAVE
ON EARTH, THE PERSON
YOU BECAME WILL MEET
THE PERSON YOU COULD
HAVE BECOME.**

Starting Your Personal Plan For 2024

My Annual Personal Planning Template

2 Diagnose where you want to grow:

Awesome! Now let's see where you want to grow. This is your chance to be brutally honest and raise your standards in every aspect of your life.

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→ What habits and disciplines would your ideal self have you currently don't?

Starting Your Business Goals For 2024

Everything you “focus” on in
2023 takes your mental energy
and physical time.

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



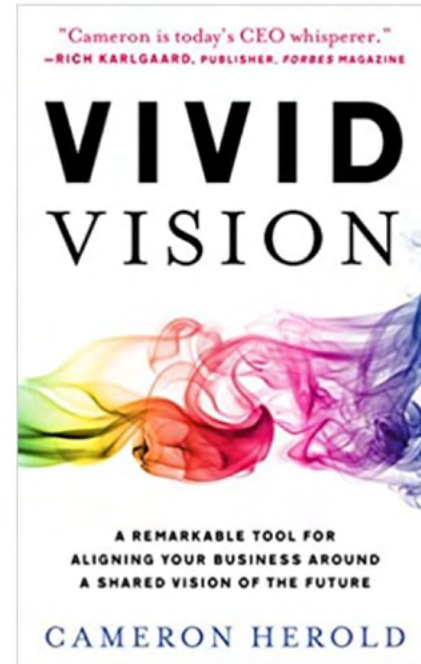


**Now, Since We Only Have
One Go Around...**

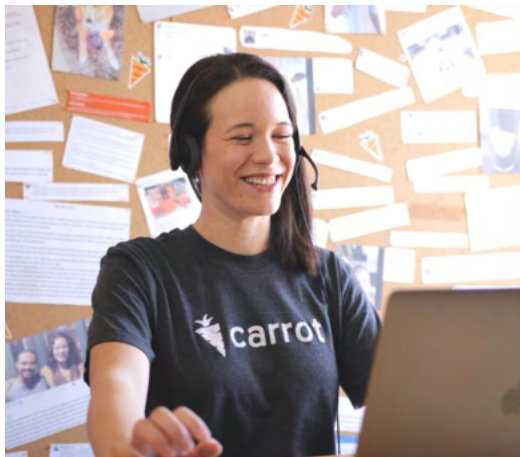
... are you using your time
wisely while you have it?

Before you can plan
2024... you have to have a
clear vision for what
you're building and why.

“Creating a Vivid Vision **brings the future into the present**, so we can have **clarity on what we are building** now. It is a detailed overview of **what my business will look like**, feel like and act like **three years out**”



Paint an exciting and clear picture



Our Vivid
Vision



Join us on our
journey to 2024

arrot

3 Year Vision Template



3 Year 1 Page Strategic Plan ('21-'23)



Our vision

"Add **humanity** to business and help people regain time for the things that matter in life"



Our mission

"We help real estate investors and agents get off the hamster wheel and gain **consistency** and **predictability** through Evergreen Marketing."



Our values

Be a Beacon of Positivity & Possibility - **Have Fun & Be Different** - Take Initiative & Show You Care - **Craft Amazing Experiences** - Adapt, Evolve, & Always Improve - Add **Humanity** To Business



Our goals

3
Year



Your big goal



Team related
goal



Important
goal here



revenue goal



other goal



Innovate + Improve



Core Strategies

Strategy #1

Text here that describes this core strategy

Strategy #2

Text here that describes this core strategy

Strategy #3

Text here that describes this core strategy



Core Metrics

eNPS:
>60

Avg. Profit Per Deal:
>\$20k

Target Cost Per Deal:
< \$3,500

Revenue:
core metric

Another metric:
another

"World-class Product + World-class Team"

Carrot

Now let's set business goals
for **2024**

GR: Setting **Key Annual Goals**

	Current:	Good	Better	Best	Notes:
Critical Metric: Profit \$	\$150k	\$200k	\$300k	\$500k	
YoY Revenue Growth %	30%	25%	30%	35%	Historicals: 2020 XX%, 2019 XX%, 2018 XX%
Other key metric		\$100k	\$200k	\$500k	
Monthly leads	X,XXX	X,XXX	X,XXX	X,XXX	
Average Rev Per Deal	\$10k	\$10k	\$15k	\$20k	As a % of overall new revenue (still need to target)
Lead to Close Ratio	6%	7%	6.5%	6%+	Work on keeping logo churn in check, improve rev retention
Net Income %	25%	20%	23%	25%+	We're investing into growth. Usual % is >30%



**O: What are the best Options
to hit the goals?**

W: What Will You Do In 2022?

Creating Your **Macro Plan**

2022 Theme: *“Insert exciting theme here!”*

	Q1	Q2	Q3	Q4
Key Initiative				
Improvement/Amplifier #1			35%	
Improvement/Amplifier #2				
Critical Metric: \$500k profit goal for the year	\$100k	\$125k	\$125k	\$150k

W: List Out Your Quarterly Initiatives

- = Non OKR initiative
- = OKR driver
- = Milestones

ACTION ITEM	OWNER	JANUARY				FEBRUARY				MARCH			
Launch split tests on go	Stephen												
Agent Sales Leads	Stephen									●	●		
1 funnel optimize (demo)	Stephen				●					●		●	
Hire this person	Trevor					●							
Cyber Monday	Stephen			●	●	●				●			
3 Video Series	Brady + Trevor	●	●										
Agent Webinar	Trevor + Brendan						●	●			●		
Landing Page TOFU	Brendan (Laynie)							●	●				
VideoPost TOFU	Brady				●	●	●						
Milestones							●			●	●	●	●

Sales
Site
updates w/
new
messaging

Cyber
monday

Agent
Webinar

Core
Price
Change

Agent
Design
+ IDX

My “Planning Stack”

- **Each Year...** review your 3+ year vision. Are you on track? Still clear? Still exciting? What’s important for the next year?
- **Each Quarter...** review your annual plan and create your plan for the quarter
- **Each Month...** review your quarterly objectives and goals/scorecards for your monthly plan
- **Each Week...** review your monthly plan, scorecards, and craft your “top 5 commitments”
- **Each Day...** review your top 5 weekly commits and craft your focus for the day



In recap...

- **Who before do**
- **Recognize your pain line**, then create a plan to grow through it
- **Give yourself permission to dream. Want vs. Need motivation**
- **Create magical moments more often and more intently**, they extend the life in the years we live



you're allowed to get up one day & just decide to change who u are. dress differently, speak up more, laugh louder, speak freely, say hey to new ppl, get that confidence going. we don't have to stay the way people see us out of the fear that they won't like the us we want to be.



Let's Do Q&A!

- Follow me on IG: @trevor.mauch
- I dive into more of this mindset stuff on my podcast the **CarrotCast**
- New programs for our highest level investors
To stand out, grow momentum, and close more deals from online leads. Hit me up!



My Top Motivational Videos Of 2023

- Matthew McConaughey - [Life Lessons Video](#)
- Tony Robbins - [Stay Hungry](#) (one of my go tos)
- Naval Ravikant - [Happiness is Peace in Motion](#) (simple but huge)
- Jesse Itzler - [Motivation and Mindset](#) (I LOVE Jesse!)
- Admiral William McRaven - [One of my favorite ones ever](#)
- Denzel Washington - [Life Advice that's priceless](#)