



Prework: Just do it.

It will be useful for you to fill this worksheet out before you come to the workshop so you already have an idea of what you want to keep and what you want to change going forward. Let’s look back at the last quarter or half-year of your business. Be thoughtful, and pull actual numbers if you need to.

How many offerings did you have?

What were they? List them out.

How many of them do you truly love?

Which ones?

How many clients did you have?

Were you happy with that number and with the way you were working with clients?

The right size packages, or more clients at a lower-involvement level vs fewer clients at a higher-involvement level.

What are the characteristics of the clients you liked working with the best?

What are the characteristics of the clients you didn't like working with as much?

Any potential clients that didn't sign with you: were there any commonalities?

Now that you've worked through these questions, think about all of it together and what you want to take from it, about your offerings, your clients, the people who didn't become your clients, any holes in your process, things you need to learn, or anything else that jumps out at you. Makes notes about that here to be ready for the webinar.