



How to plan your wellness business goals – and achieve them!

with Vicky Shilling
the wellness business mentor

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VICKYSHILLING.COM





Hello I'm Vicky!

I'm a mentor and coach, helping health & wellness practitioners build solid business foundations and unshakeable self-belief



Share and tag me!



@vicky.shilling



@vickyshillingcoaching



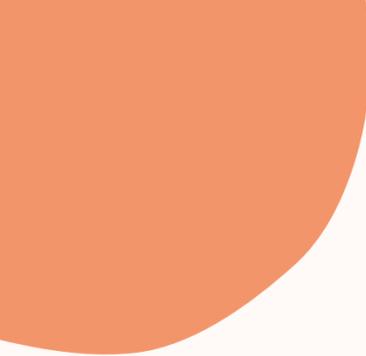
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How to plan your wellness business goals – and achieve them!



1. Visualise
2. Set intentions for the year
3. Break it down into 90 day goals
4. Plan your actions
5. Uncover your protective beliefs



Goal setting is a verb, not a noun

- This is an on-going activity, not a once-a-year event.
- This is a way to keep focused throughout the year
- This is a way to feel more fulfilled by what you're doing
- This is not another way to set you up to fail. This is a **process**.
- Please keep raising any and all mindset blocks that come up to this process as we go through, we need to tackle them to make this work!

WHAT IS YOUR RELATIONSHIP WITH GOALS?

	GOAL DRIVEN	GOAL ORIENTATED	GOAL DREAMER	GOAL AGNOSTIC	GOAL AVERSE
How I think about goals	<p>My business is a way for me to achieve goals.</p> <p>I embrace ambition and feel stimulated by a stretch target.</p>	<p>I enjoy the process of setting targets, making progress and achieving aims.</p> <p>I value witnessing my personal growth and feel excited by possibility.</p>	<p>I like the idea of goals, and tend to stay in 'dreaming and scheming' them.</p> <p>I am reluctant to commit to taking action towards achieving goals.</p>	<p>I don't know what goals to choose or choose too many and scatter energy.</p> <p>Take a 'what will be, will be' approach to goals.</p>	<p>I tend to avoid or dismiss or ridicule goals.</p> <p>Enjoy being an outsider and doing business differently.</p>
THE LIGHT When I create goals my conscious mind says:	I have unlimited potential.	I am creative, capable and committed.	I am present in the here and now	I am unattached to achievement.	Goals are not important to me
THE SHADOW When I create goals my unconscious mind may be saying:	The harder I work, the more I feel worthy.	Don't aim too high. Don't get too big.	I don't trust myself to follow through. This is too hard.	I can't handle the pressure.	I don't know who I will be if I achieve or fail at this goal.
Because deep down I am afraid of...	<p>Failure</p> <p>Disappointment</p>	<p>Disappointment</p> <p>Conflict</p>	<p>Complexity</p> <p>Judgement</p>	<p>Complexity</p> <p>Success</p>	<p>Complexity</p> <p>Rejection</p>

Visualise



Vision

Yearly intentions

90 day goals

Weekly / daily actions



Vision

Yearly intentions

90 day goals

Weekly / daily actions



Visualise

- If you can't visualise where you want to be, then you won't be able to get there.
- Visualising helps us with the **why** and helps us identify how we want to **feel**. That's what will keep driving us when things get tough (and they will get tough, trust me).
- Visualising helps us tap into that inner mentor. It's reassuring. And it's something we can keep coming back to.



Mindset block:

**The ideal life I visualise is
totally impossible to achieve**

Visualise

- You need to separate your vision from the 'how.'
- It is not necessary to understand and know every single step that needs to happen to achieve what you want.
- The shadow archetype is the **saboteur**. In your mind she says "yeah but *how?*" "I don't understand" or "that doesn't make any sense."
- The opposite is the enlightened archetype of the **magician**. She says "I don't know how, but I know it will happen" or "This is happening."



Visualise

- You need to know you are truly worthy and deserving of whatever it is you want in your life, however big or small.
- You don't need to earn it or justify it. It doesn't have to be altruistic or benevolent. You're allowed to want more in your life just because.
- If you've never done this sort of exercise before, allow yourself to dream. Allow yourself to go there with no restrictions and no limitations.



Let's visualise together

Visualise

Write in the first person and present tense, as if this is your life right now:

- Imagine yourself with your dream wellness business. How does your ideal work day/ week look?
- What are you doing? Who are you working with? How do you feel?
- What are you doing *more* of? What are you doing *less* of?
- What opportunities come your way?
- Where are you living? How do you spend your time outside of work?
- How much do you have in your bank account right now? What does that money enable you to do?



Intention Setting



Vision

Yearly intentions

90 day goals

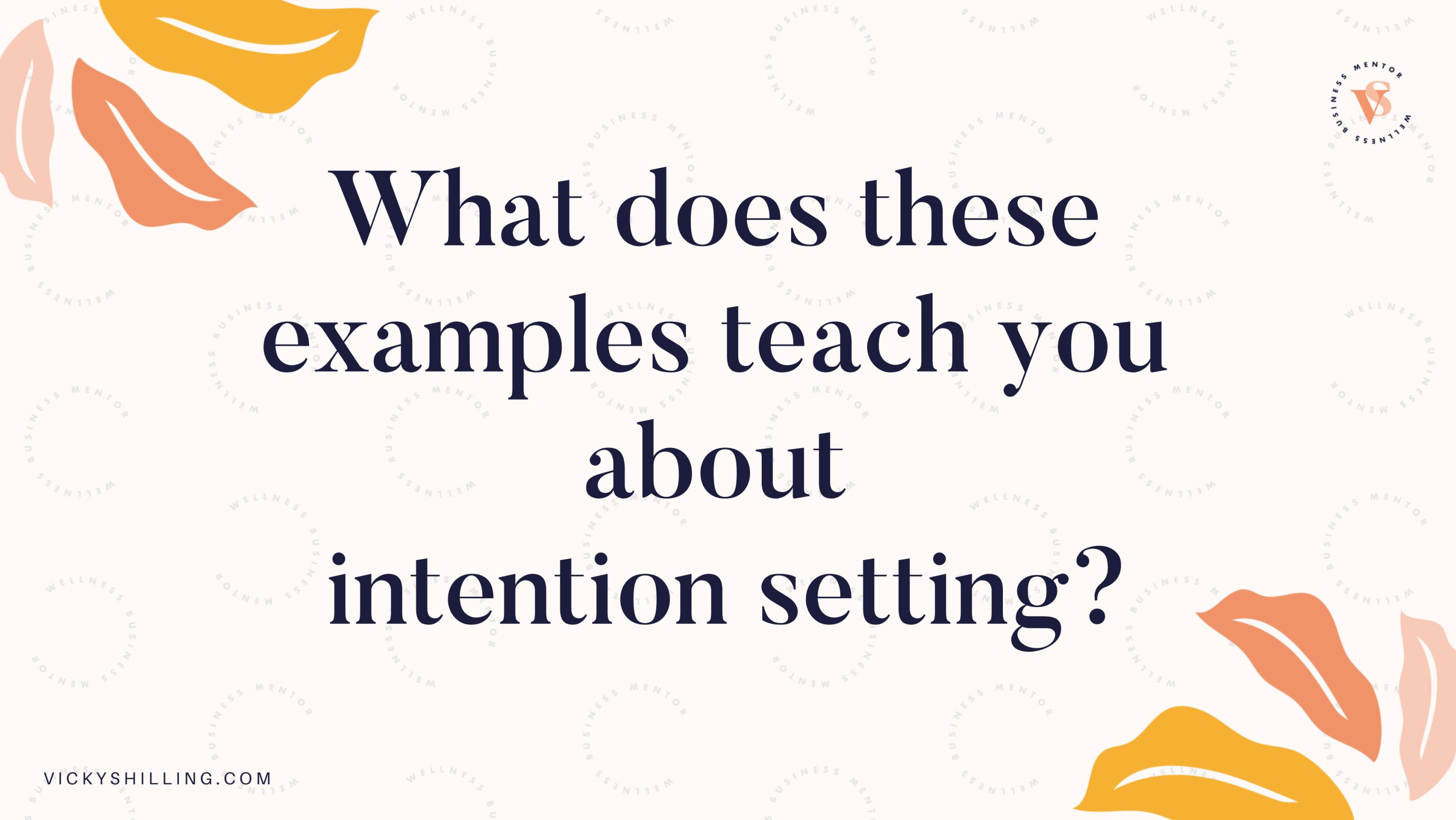
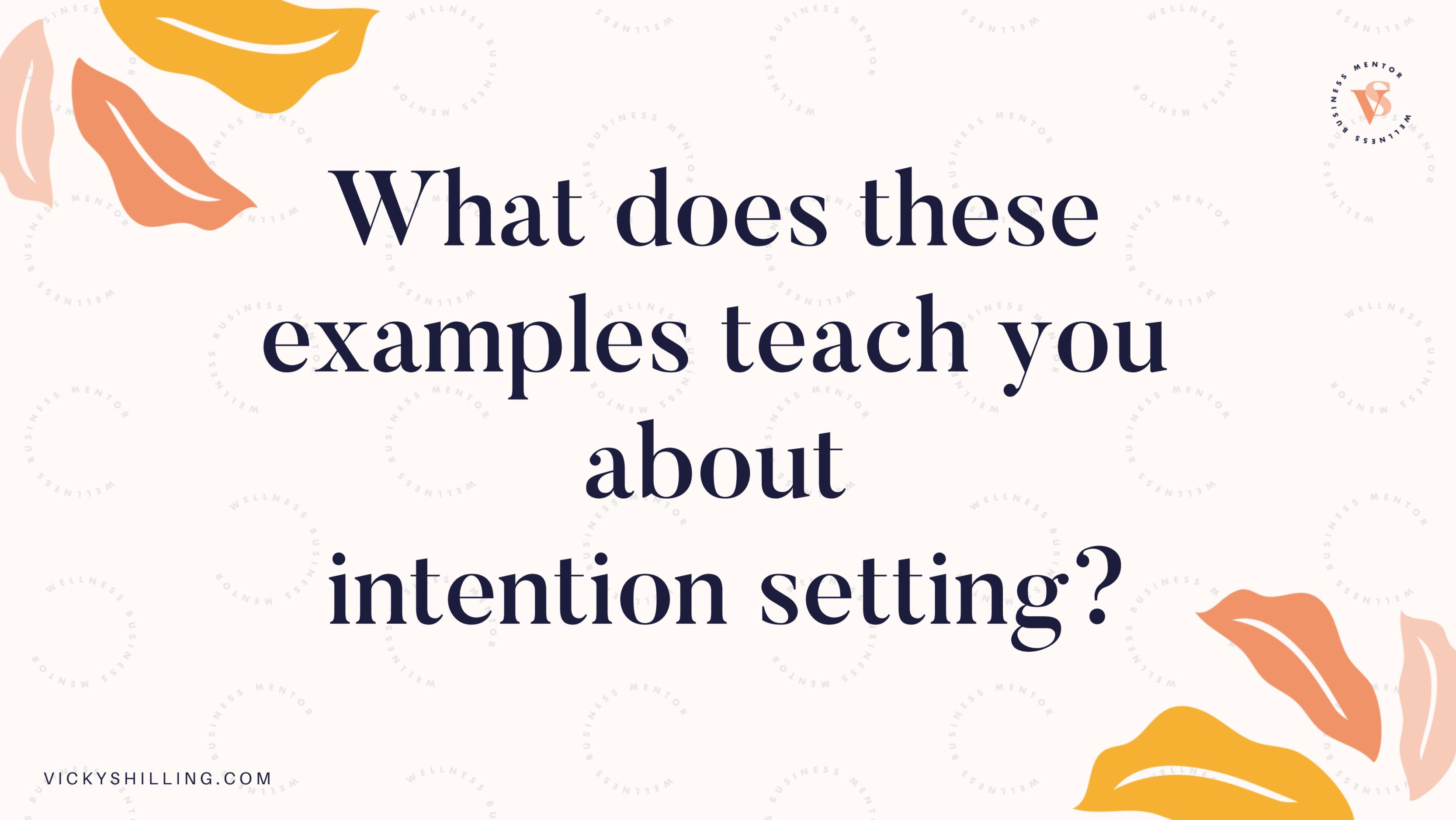
Weekly / daily actions



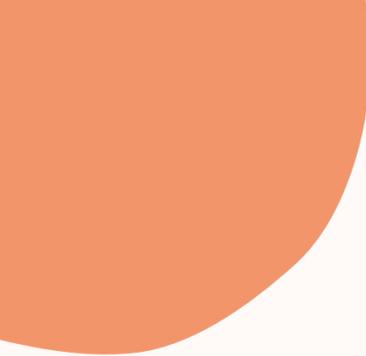
Intention setting

- 1-10 overarching intentions for the year.
- These are hopes, commitments, big figures, dream numbers and juicy, exciting points to work towards.
- These should light you up right now. And they should help you move towards your vision of the life and work you want i.e. linked to the vision we just sat in.





What do these
examples teach you
about
intention setting?



Intention setting

- There is actually a lot to celebrate
- Things change – you’re not a failure if you don’t meet these intentions
- Be as specific as possible so you can measure and chart progress – and don’t be afraid to keep tracking!
- Lessons learned and the journey are more important than the end result (sometimes discovering what we *don’t* want to do is just as valuable, if not more so)





**If you do literally nothing else
I recommend in this session,
do this one thing: start a
separate bank account for
your business.**



Write your intentions for the year

Break it down into goals

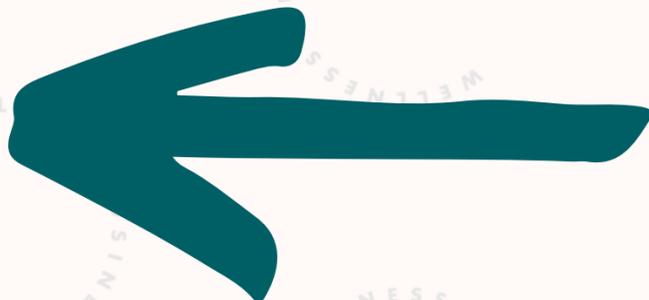


Vision

Yearly intentions

90 day goals

Weekly / daily actions



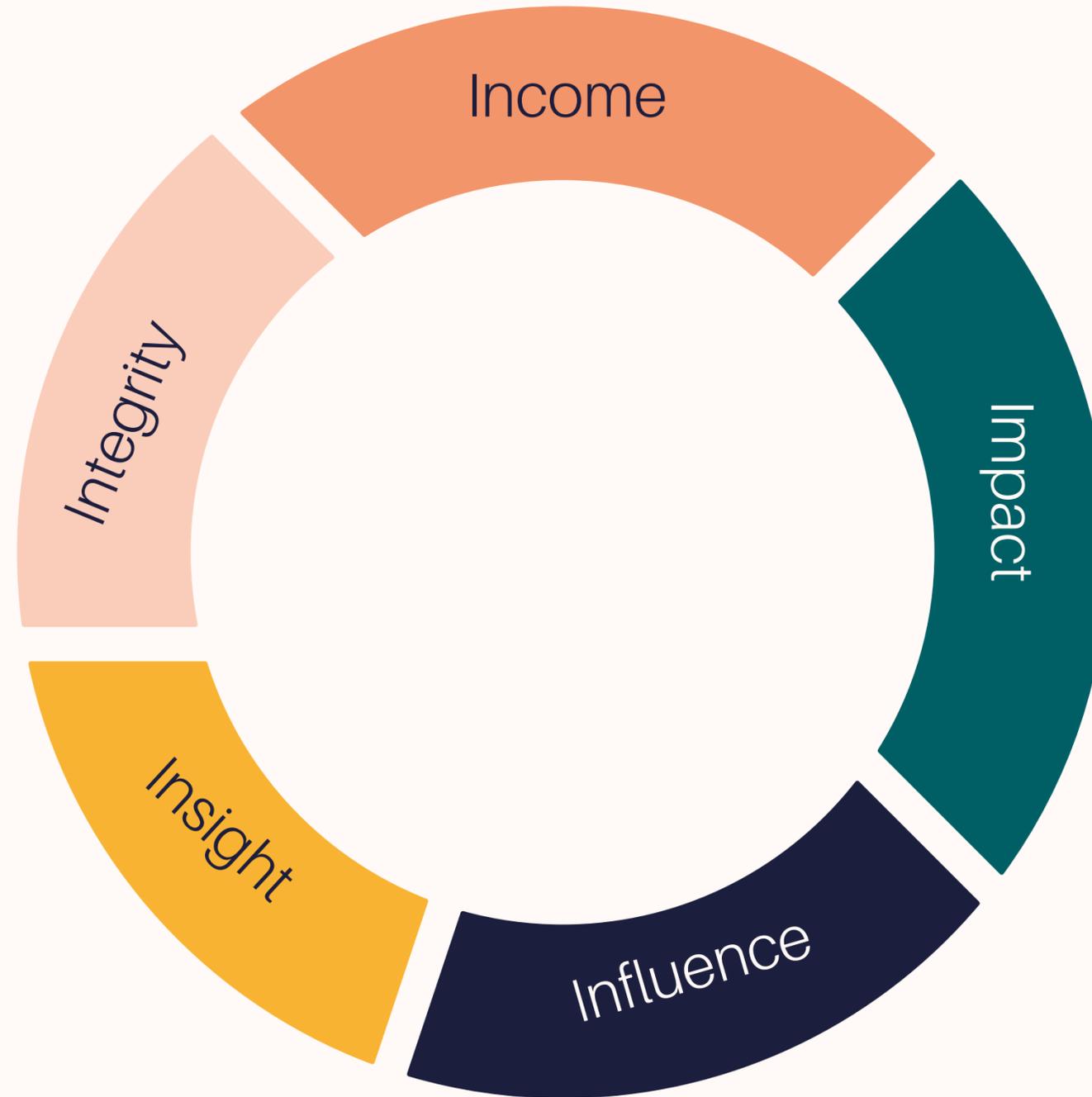


A pause to consider your capacity

- 90 days might feel like a long time. And it is in many ways. But it goes fast.
- You can do **anything** but not everything at once.
- There may be things you want to achieve that need to be pushed out from this quarter.
- Consider what other life things you have going on this quarter (that you *want* or *need* to allow time for) before setting goals. **For god sake plan some time off.**
- How much time do you *honestly* have to work on your business each week?

**How do I break it into goals?
What should I prioritise?**

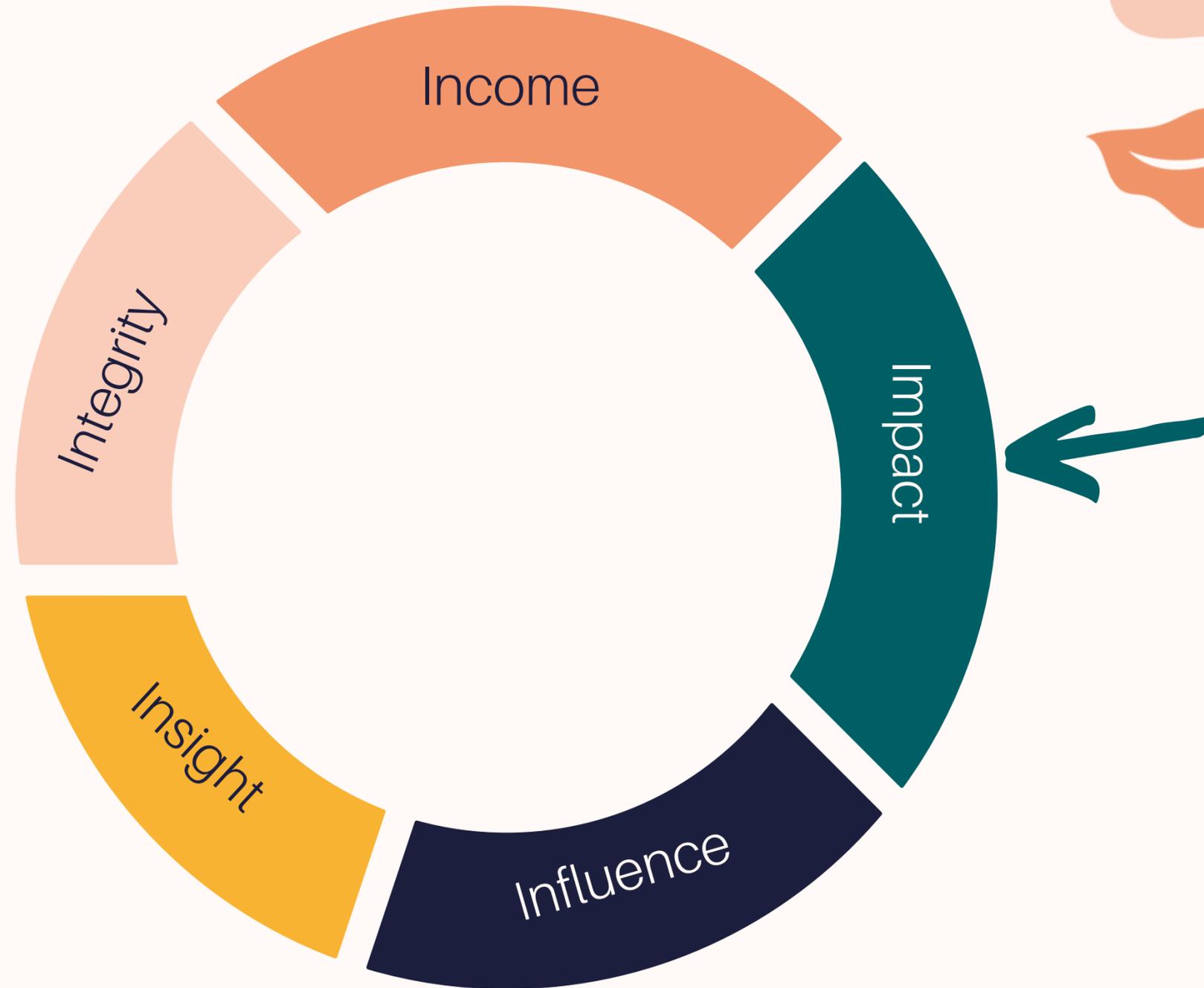
Break it down into goals



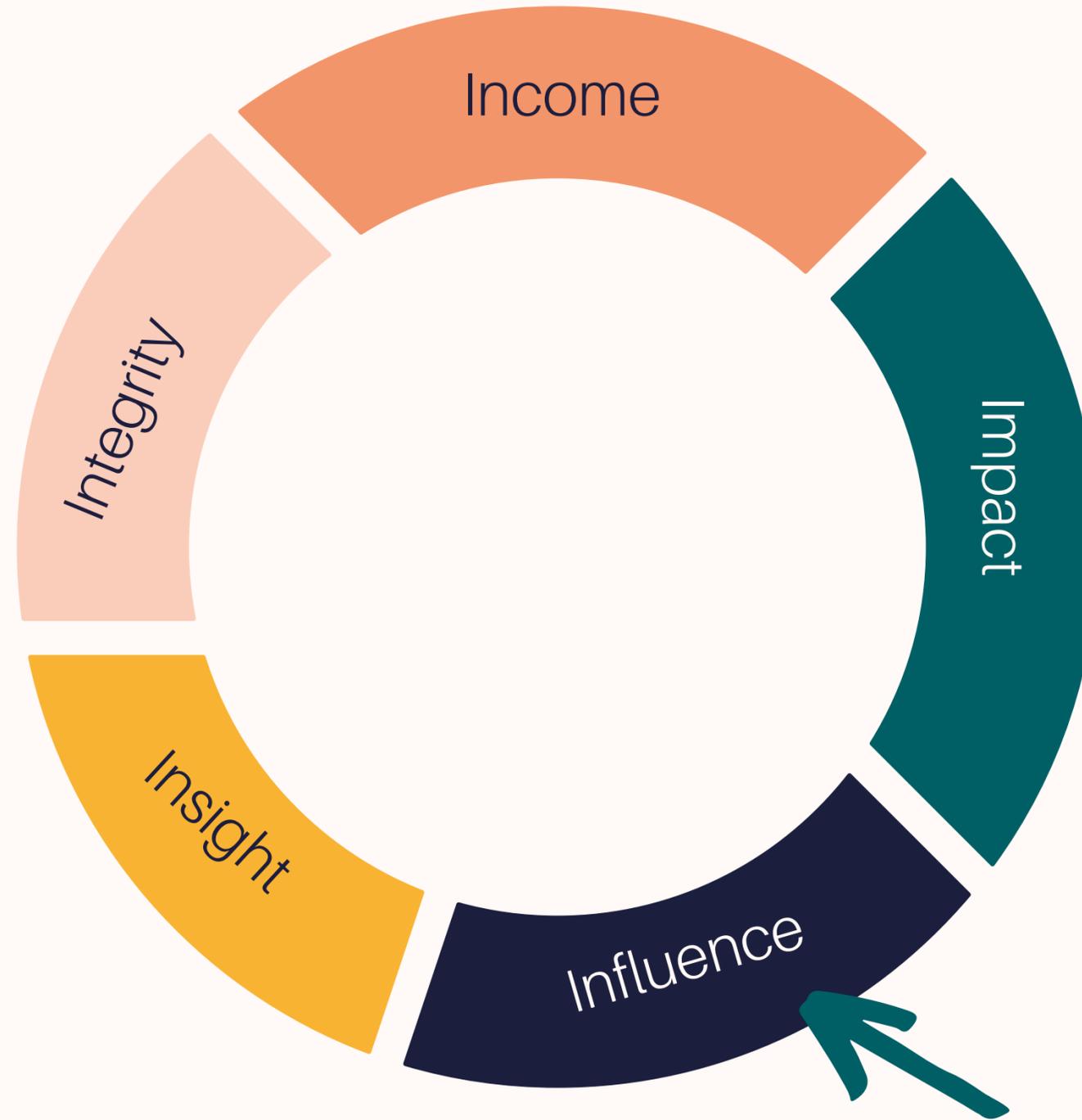
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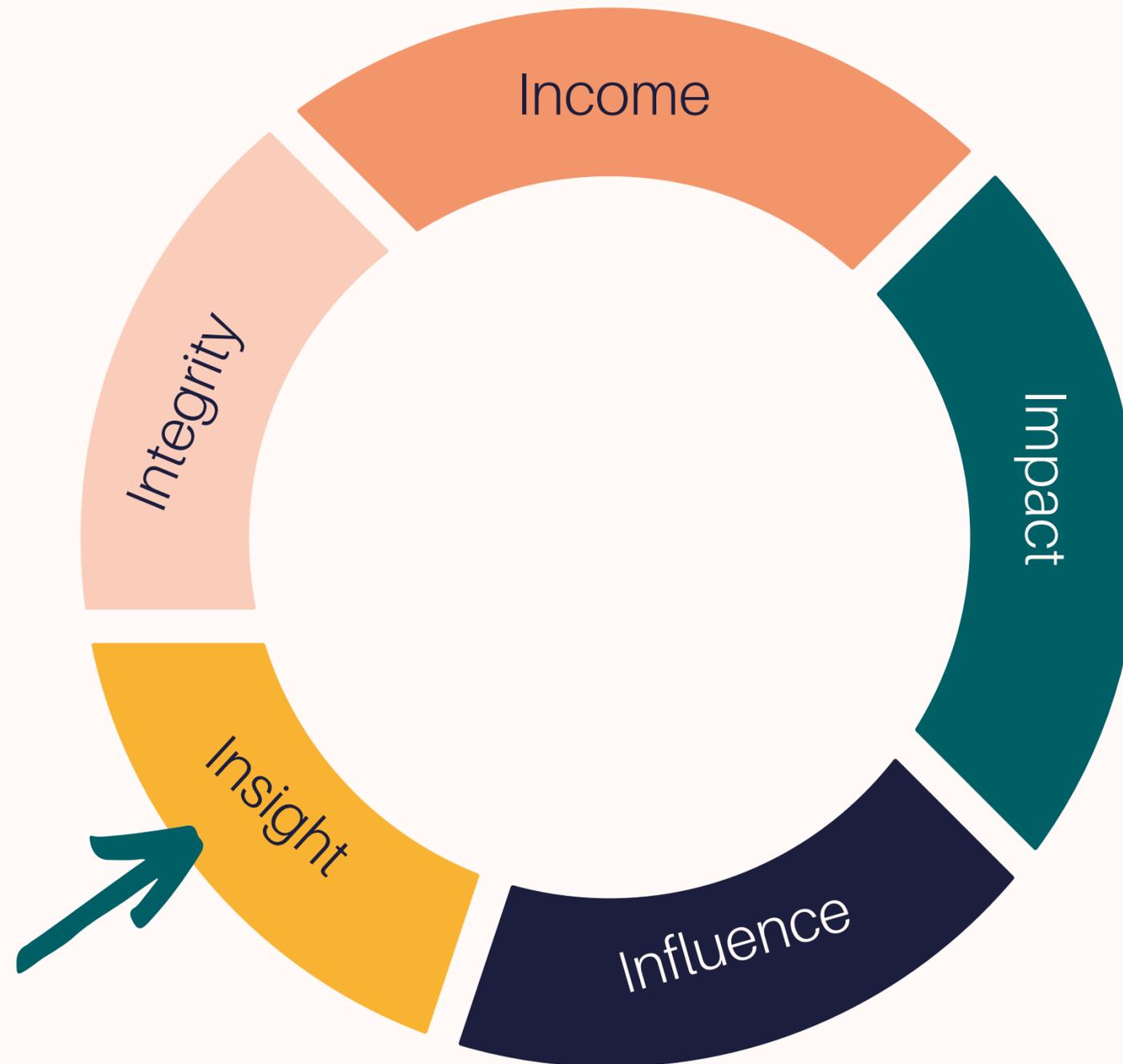
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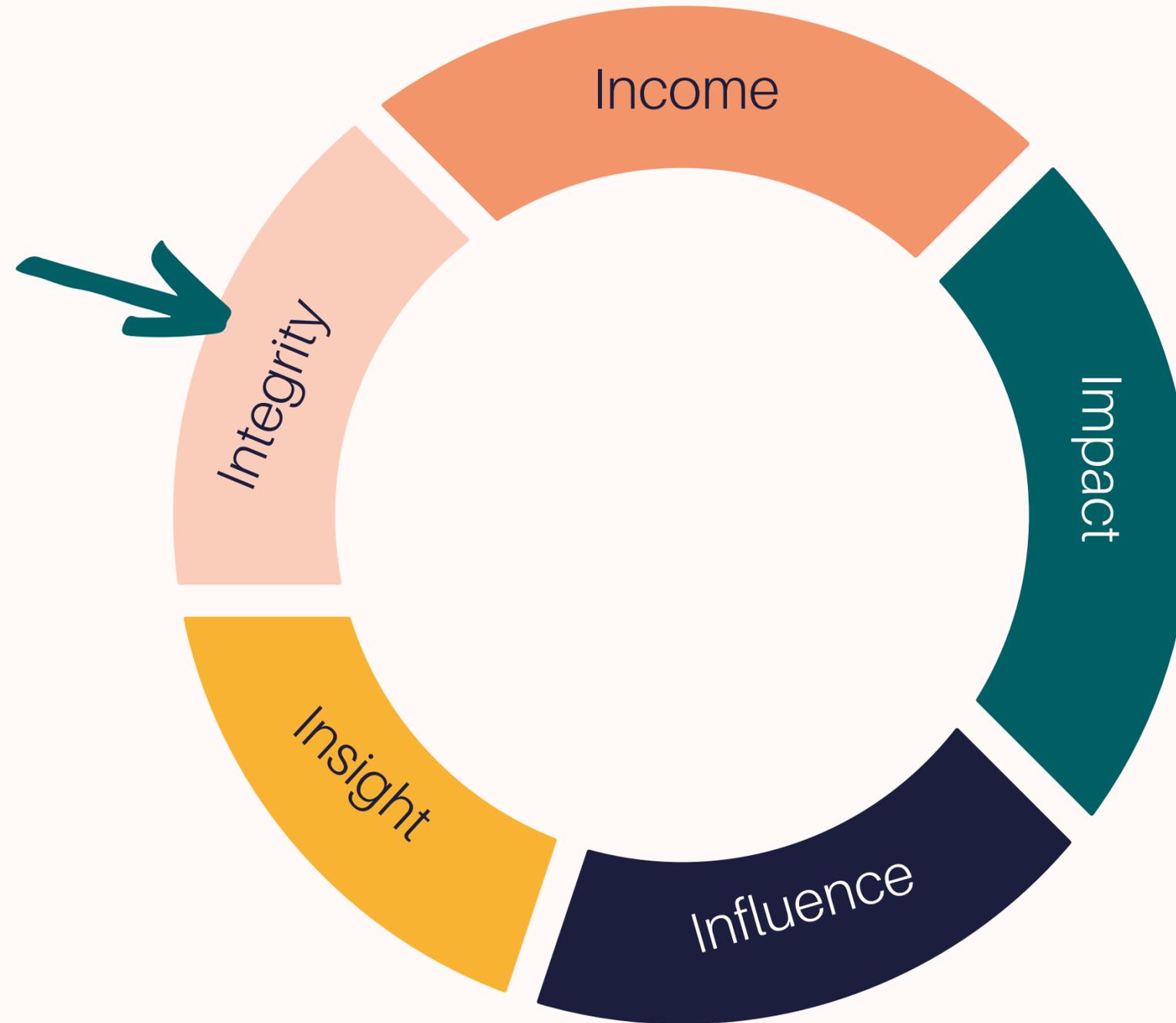
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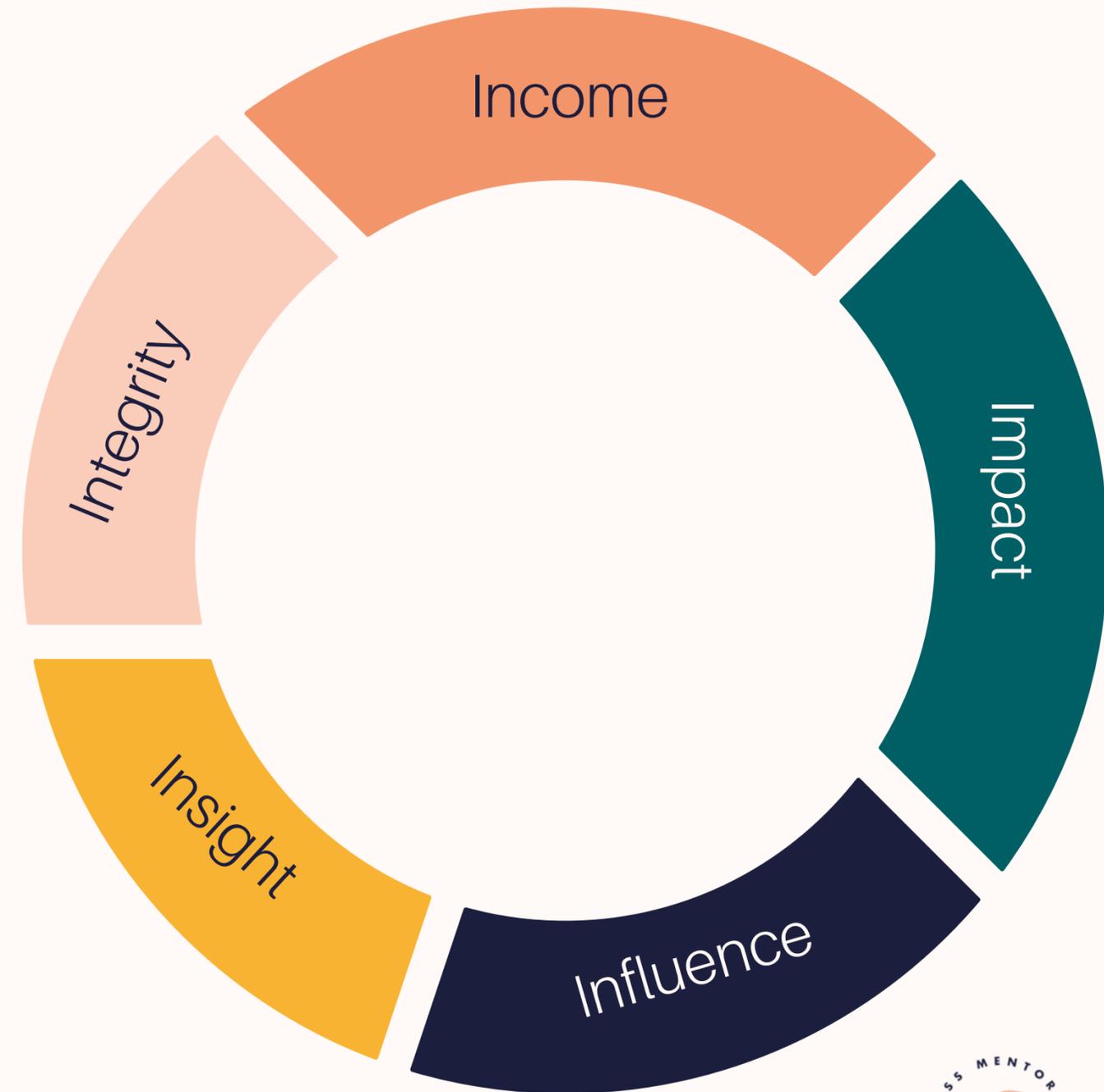
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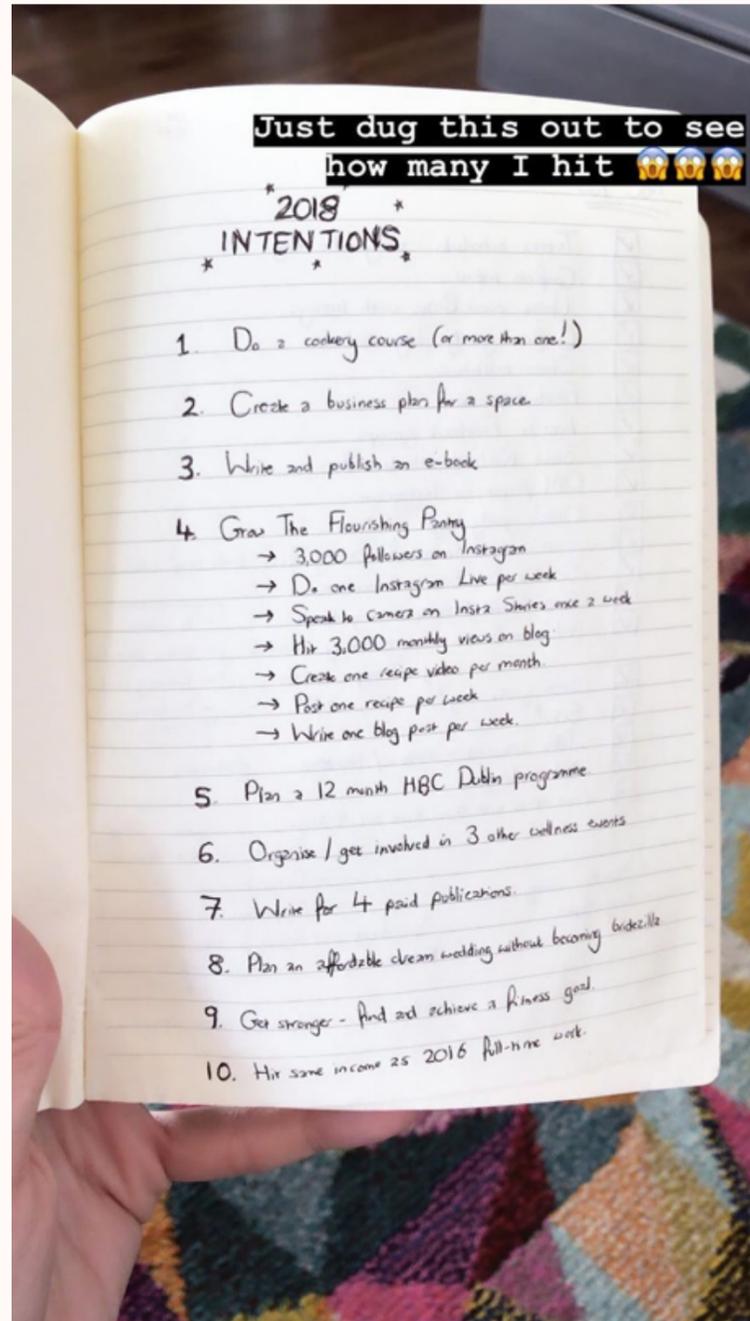
Break it down into goals

It is the 31st March 2024 and I...

1. Have earned X amount of money
2. Have helped X number of clients through X offers
3. Have promoted myself in these ways X
4. Have learned and acquired X skills
5. Am able to achieve all this because I have X

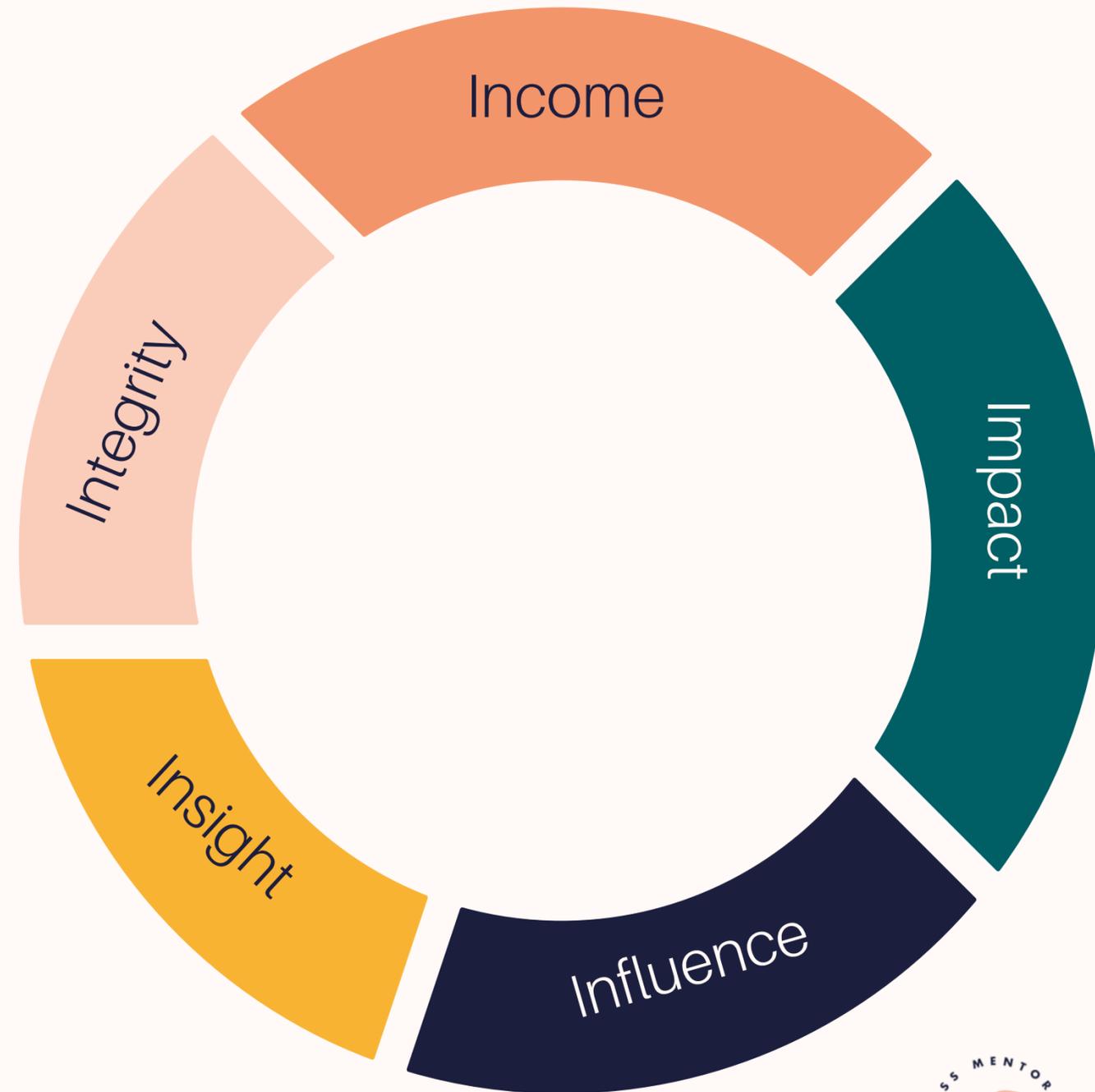


Break it down into goals



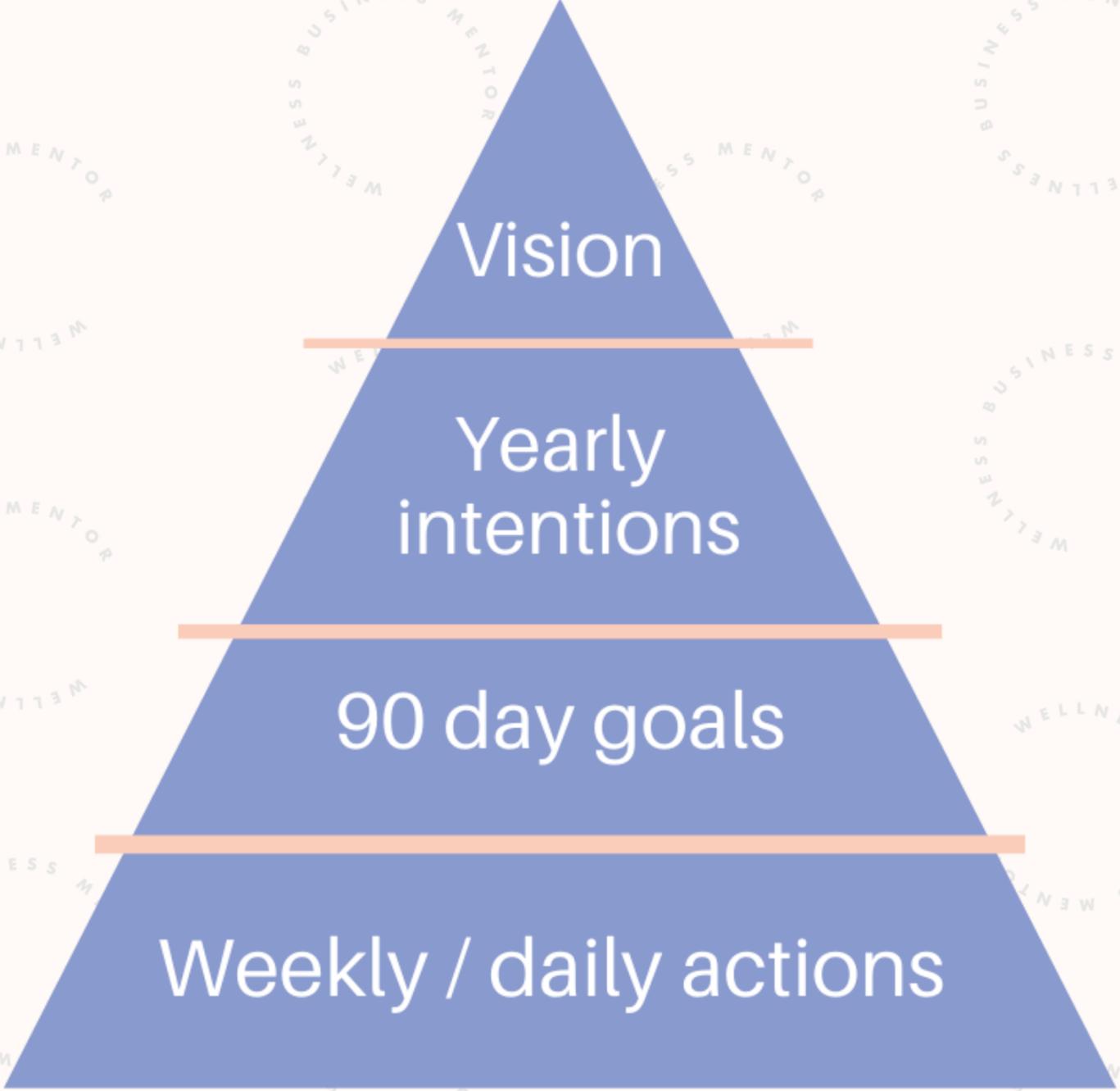
It is the 31st March and I....

1. Have earned €10k
2. Have made that through HBC, music work, retreats and paid writing / content producing
3. Have kept to my blogging and IG content plan
4. Have researched courses I want to take
5. Have booked a wedding venue and chosen a dress and committed to a gym plan



Problem:

I have a lot going on health / personal life wise. I want to keep income and motivation - how can I set smaller, more realistic goals that stil keep me moving forward?



Vision

Yearly intentions

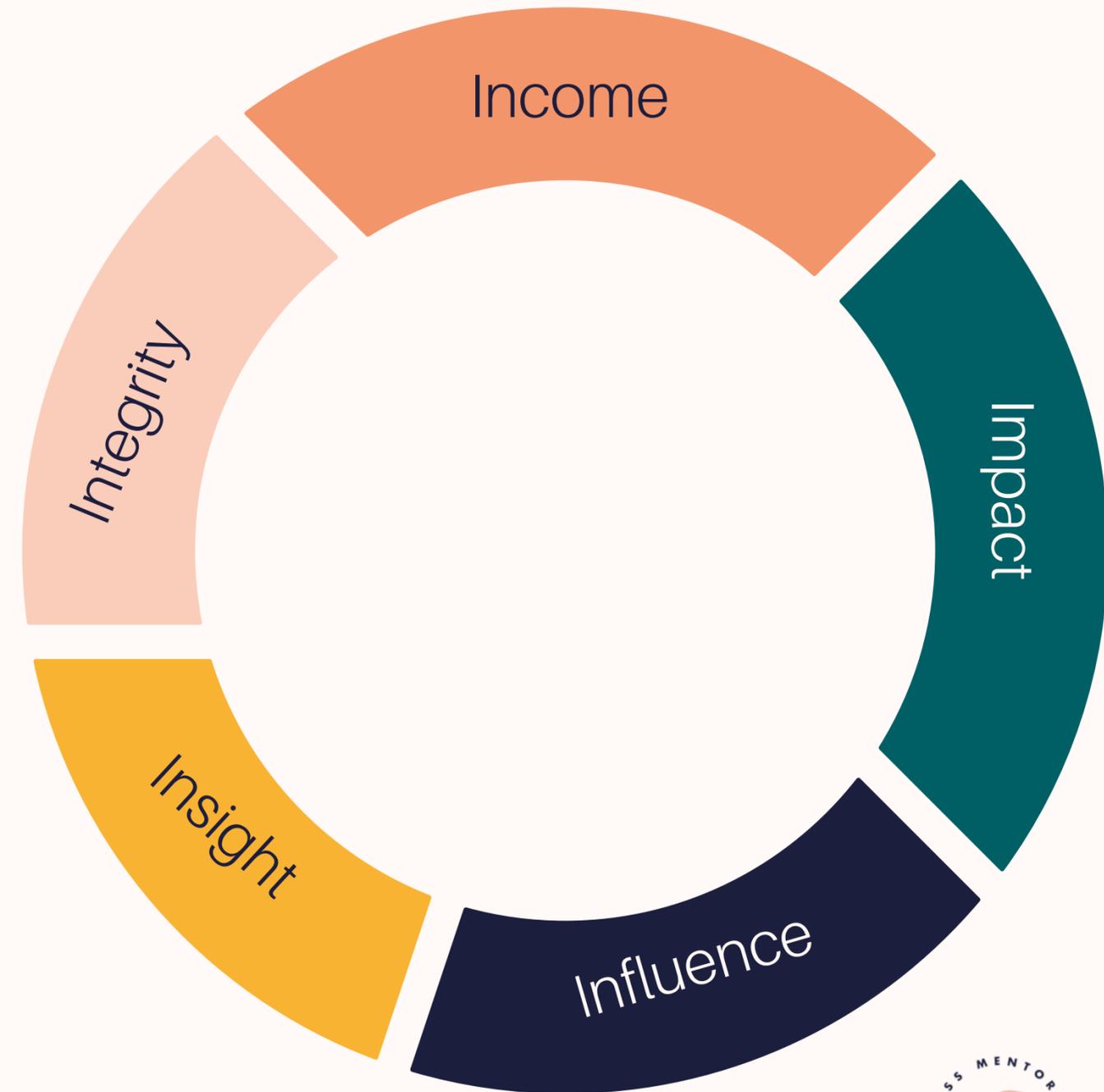
90 day goals

Weekly / daily actions

Break it down into goals

It is the 31st March and I...

1. Have earned €0
2. Have had 0 customers or clients
3. Have committed to a course or programme to teach me how to market my business
4. Have followed through and tested 1-2 marketing strategies I've been taught to start building an audience (X goal)
5. Have unsubscribed and unfollowed anyone else distracting me from the one course I'm committed to learning on right now



Problem:

Are my goals realistic?
How do you set 'realistic'
goals?

A few thoughts on 'realistic' goals

Practical notes:

- Be honest about how much time you have to give to your goals and what your competing pressures and demands are in life.
- If you're doing anything completely new **accept that it will take time** and that no matter what a clever marketer has told you, it won't happen overnight
- We always over-expect, particularly at this time of the year. **Be kind to yourself.** And learn each time you go through rounds of this process to pare it back.



A few thoughts on 'realistic' goals

Self-belief notes:

The only reason you worry about setting 'realistic' goals is because of how you think and feel about not achieving them (or potentially not achieving them).

Your self-doubt may tell you that failure, disappointment or rejection are **the worst thing that can happen to you**. And that's a protective part of you trying to keep you safe and not write or strive for a goal that could risk that happening to you.

Show that part of yourself some compassion.

It's doing an amazing job keeping you safe from that risk.



A few thoughts on 'realistic' goals

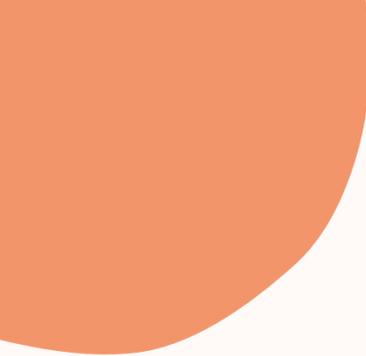
Self-belief notes:

If you can stop making 'failure' or not reaching these goals something that floors you and prevents you continuing on, then **it doesn't matter if goals are 'realistic' or not.**

They're just something you wrote on a piece of paper, worked towards, and then learned from when you reflect on the actions you took (or didn't take) to try and achieve them.

This happens when you cultivate **self-belief**. When your self-belief is unshakeable regardless of what happens, you know that no failure permanently affects you.





Break it down into goals



- Keep your monthly / quarterly goals somewhere you can refer to them at all times. They will dictate your daily actions.
- You could save them as your desktop background, put them on a post-it on your computer, write them in the front of your notebook. Just have them easily accessible for when you're writing your daily to-do list.



2023 intentions

* Make €140k minimum in my business, with more ease, more flow and more confidence.

* Shifting who I am and how I serve from reliance on 1:1 work (49% of income in 2022) down to 30% of income in 2023 i.e. less than €40k from 1:1.

* Help 500 people start and grow their businesses

- 2 Elevate clients max.
- 10 Turning Point Days
- Keep mastermind at 12-15 members
- Get minimum 37 new Just Start Now members
- Sell 175 digital products (self-paced courses)
- Run events that help action taking wellness pros!

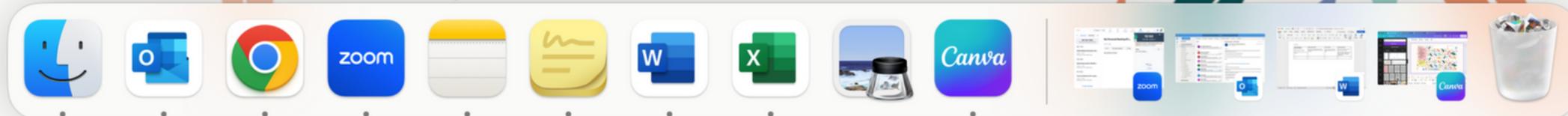
* Make more time for rest and relaxation and self-care - total of 6 weeks (30 days) holiday completely off the business and a day at a hotel each quarter to myself

* Grow Vicky Shilling the brand:

- * Adjust ideal client to align w/ action-takers
- * Run more in-person events
- * 2,500 on mailing list
- * Record and release another 20 episodes of the podcast and hit 100k downloads
- * 25k visits to website
- * 8,500 IG followers

It's the 30th June 2023 and I have...

- Signed 1 new 1:1 client
- Got 50 paid people signed up for MWSM
- Got 10 new Just Start Now members
- Recorded and released my audio book
- Filled CEO Day with 15 people
- Updated all email funnels and tested some ads
- Run niching bootcamp and upsold Just Start Now



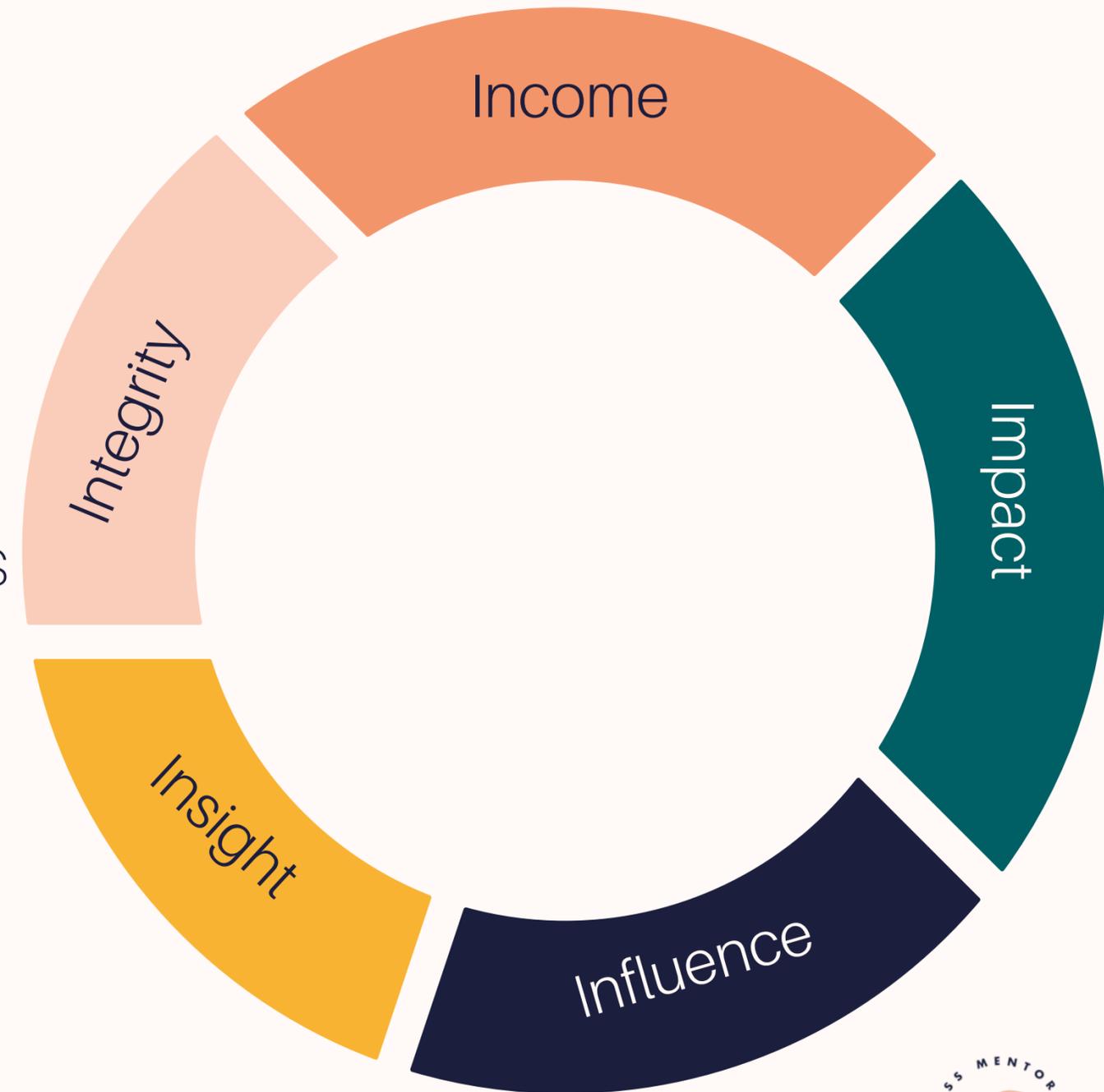
Write your Q1 goals



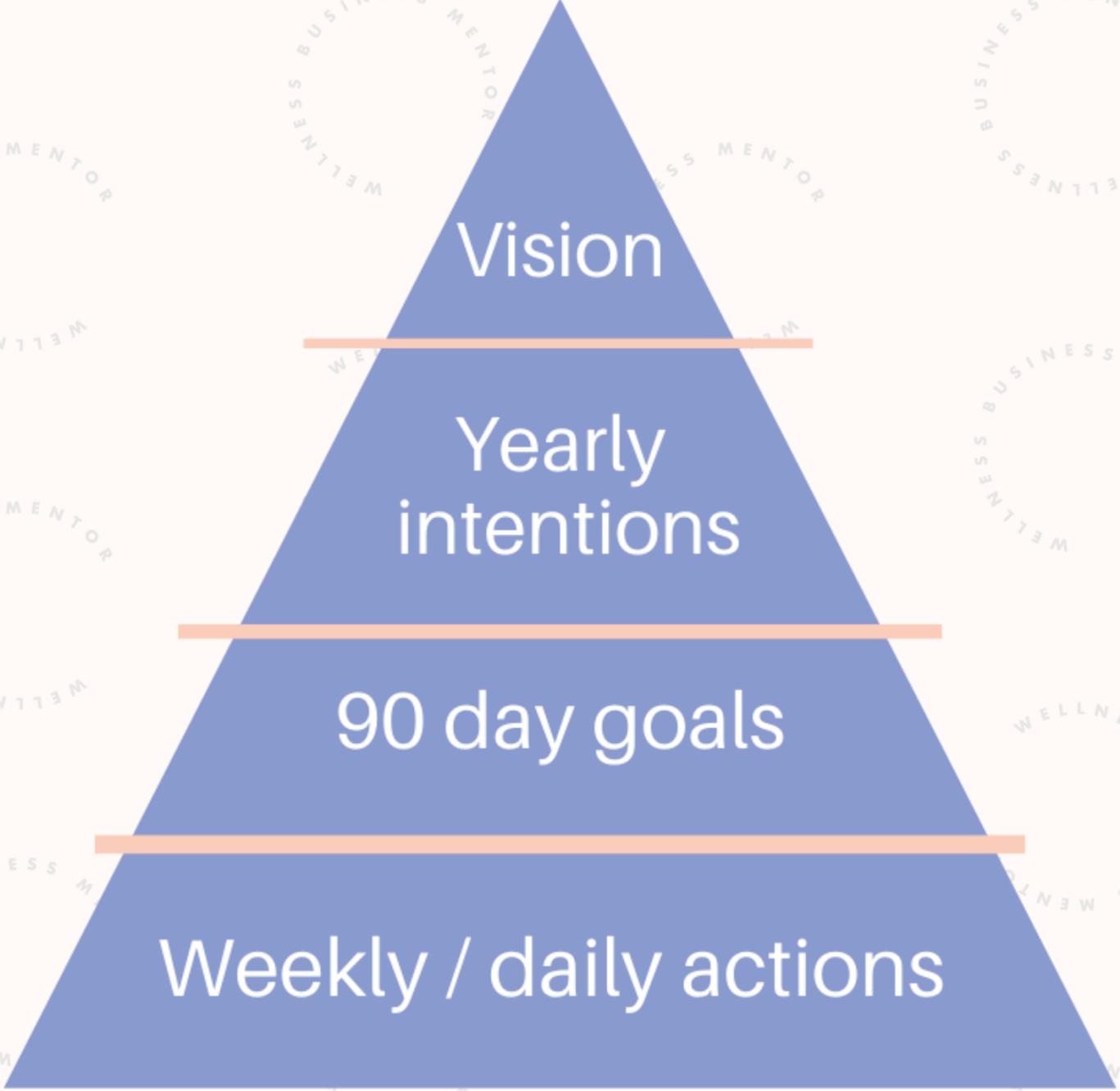
Write your Q1 2024 goals

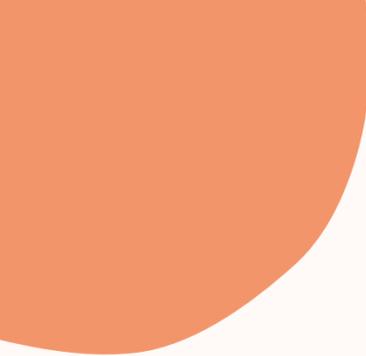
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Plan your actions





Plan your actions

- Actions are the bits that **you** are in control of.
- What can **you do** to help your goals be achieved?
- What methods will you use? How much time are you going to commit? Who are you going to ask for help?



Plan your actions

Let's take an intention to gain 1k new Instagram followers.
Which became a Q1 goal to get 150 new followers.

You can't force people to follow you.

You can't make other people do what you want.

All you can control is *what you do*.

So how could you get 150 new people to follow you?



Plan your actions

- Buy followers
- Try follow for follow back
- Dedicate 30 minutes every day to active engagement on IG
- Reply to everyone who comments on my posts and leave them a comment in return
- Take an Instagram course
- Visit all my followers accounts and leave them comments
- Post x4 a day
- Post x1 a day
- Post x3 a week
- Download an app to suggest optimum posting time
- Do some research into popular content and replicate it in my own style
- Ask people who they follow and why
- Add my Instagram handle to my email signature
- Add my Instagram link to my LinkedIn profile
- Plan a collaborative promotion with an influencer with your same ideal audience
- Pay to boost posts
- Do hashtag research
- Ask people to share my content
- Actively connect with ideal customers by going to my competitors IG accounts and searching through their followers



Plan your actions

These are all actions you are in control of.

You get to choose whether you do or don't take the actions.

No-one else is involved.

No actions are *guaranteed* to work.

Pick the actions and add them to your daily diary. Repeat as necessary.



Plan your actions

Yearly intention: Start a podcast and hit 10k downloads by the end of the year

Q1 goal: Podcast ready to launch in Q2

Actions:

- Invest in a podcasting course and follow the steps to get started
- Ask a friend who has a podcast if you can do a skill-swap to learn how they set theirs up
- Research platforms to host the podcast
- Buy a podcast microphone
- Write a shortlist of guests I want to interview
- Find a jingle
- Design (or commission) podcast artwork
- Record a test episode
- Practice editing an episode OR find a podcast editor

Plan your actions

If you have a list of your actions then you can review them afterwards, and assess what worked and what didn't.

From there you can tweak for next time, rather than keep doing the same thing and expecting different results (which is the definition of insanity).

You can also reflect on where you *didn't* take action and why that occurred and what needs to be different to take action going forward (self-doubt work!).

You'll only learn by doing. And probably failing a few times first.

Plan your actions

- At the end of each month assess how you've done.
- Have you met your goals? What worked? What didn't?
- Did you take all the actions you wanted to in order to achieve the goal? If not, what got in your way? How could you change that next month?
- What curve balls and new opportunities did the Universe throw you while you were busy taking action (that you are super grateful for)?





Take one of your Q1 goals.
Write down weekly /
daily actions that will help
you achieve it.

Plan your actions

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Q1 goal: Podcast ready to launch in Q2

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Uncover your protective beliefs



Take your list of actions



What have you been doing instead of taking these actions and/or what are you likely to do instead of these actions when left on your own!?

Think about: procrastination, perfectionism, proving yourself, passive behaviours, paralysis, placating.



What is in your worry box?

What are the worries and fears you have about taking your actions?

What is competing with your big goal?

Decorative orange and yellow leaves in the top left corner.

What protective beliefs lie underneath your worries and behaviours?

**Protective Beliefs are designed to protect you from:
rejection, conflict, success, judgement, failure, complexity and
disappointment**

Write your protective beliefs as “I believe that...”

Decorative orange and yellow leaves in the bottom right corner.

Uncover your protective beliefs

The actions you want to start taking (or do more of) to reach your goal:

What you've been doing instead / what you're likely to do instead when left on your own!

Think about: procrastination, perfectionism, proving yourself, passive behaviours, paralysis, placating.

In my worry box:

What are the worries and fears you have about taking your actions?

What is competing with your big goal?

My protective beliefs:

What protective beliefs lie underneath your worries and behaviours?

Protective Beliefs are designed to protect you from: rejection, conflict, success, judgement, failure, complexity and disappointment

Research website platforms and committing to one

Get a quote from a website designer

Apply for funding to get cost of website covered

Write the copy for the essential pages on my site

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Looking endlessly at other people's websites (procrastination)

Watching hours of tutorials on how to build a website (procrastination)

Ignoring the website goal completely and focusing on social media instead (paralysis)

Spending hours 'perfecting' the wording for the site so it can't go live (perfectionism)

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I worry it's too hard and I'm a technophobe

I am afraid I'll get it wrong or attract the wrong sort of people

I'm scared I'll spend money and it will be a waste

Uncover your protective beliefs

The actions you want to start taking (or do more of) to reach your goal:

What you've been doing instead / what you're likely to do instead when left on your own!

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I worry it's too hard and I'm a technophobe

I am afraid I'll get it wrong or attract the wrong sort of people

I'm scared I'll spend money and it will be a waste

I believe if I publish a website I will be judged by my friends (judgement)

I believe it is too complicated to publish a website, I am not capable (complexity)

I believe even if I have a great website I still won't get clients (failure/rejection)

Uncover your protective beliefs

<p>The actions you want to start taking (or do more of) to reach your goal:</p>	<p>What you've been doing instead / what you're likely to do instead when left on your own!</p> <p>Think about: procrastination, perfectionism, proving yourself, passive behaviours, paralysis, placating.</p>	<p>In my worry box:</p> <p>What are the worries and fears you have about taking your actions?</p> <p>What is competing with your big goal?</p>	<p>My protective beliefs:</p> <p>What protective beliefs lie underneath your worries and behaviours?</p> <p>Protective Beliefs are designed to protect you from: rejection, conflict, success, judgement, failure, complexity and disappointment</p>

Uncover your protective beliefs

Now you can see your protective beliefs in black and white:

1. **Get curious** about why you have this belief - where has this risk happened to you before? What is the 'survivor' part of you trying to avoid happening again?
2. **Get compassionate** towards your inner protector. It's doing an amazing job keeping you safe and stopping you even trying to do something new that presents a perceived risk you experienced in the past.
3. **Decide if you want to keep this protective belief.** It's okay if you do. But if you'd like to change it or ensure it's not getting in your way of trying new things then....
4. **Think about what would be a more supportive belief instead.** Something you 100% believe right now still, but that is more useful in assisting you taking action than the protective belief.



Mindset block:

What do you do if you put loads of effort into one of your goals but it doesn't go to plan?

Plan your actions

If it doesn't 'work':

- **Biggest question to ask yourself:** What am I making this mean?
- **Look at your protective belief:** What was your big fear? Can you show yourself some compassion wanting to avoid this and taking steps anyway? And what do you know now it's happened about yourself?
- **What do you do?** *Learn from it - and don't give up!*
- **Reframe:** You showed up for yourself and taught your mind that you can trust and rely on yourself to do what you say you're going to do
- You learned something along the way - even if it's what you *don't* want to do in future or what *doesn't* work
- Some sort of other action or outcome will inevitably transpire as a result of you taking action - the Universe will be watching and responding.



Mindset block:

How do I work out how much time it takes to do some of these actions?

I always think actions will get done quicker and I don't like how it makes me feel when it takes longer and then I struggle to move forward.

Plan your actions

What happens if it takes longer than you planned:

Practical notes:

- You can't know how long something is going to take, particularly if you've never done it before. Give yourself some grace!
- Work in time blocks rather than task blocks i.e. I am going to spend 20 minutes starting to set up my mailing list. Rather than "I'm going to set up my mailing list today."
- Track your time spent on tasks so you can learn how long things take e.g. writing a blog or an email, or creating a social media post.
- Set a timer so you stay focused and/or time block your day (and put something nice in that you want to do after a big scary new action to drive you)



Plan your actions

What happens if it takes longer than you planned:

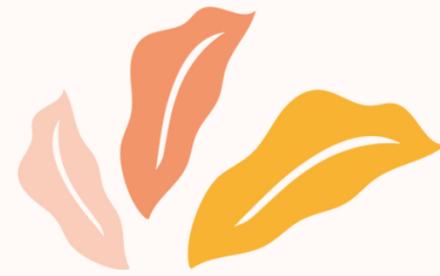
Self-belief notes:

- **Biggest question to ask yourself:** What am I making this mean?
- **Look at your protective belief:** What is your reaction to actions taking longer than you want telling you that you believe? That you are a failure? That what you're trying is too complex for you? Can you show yourself some compassion wanting to avoid this and taking steps anyway? And what do you know now it's happened about yourself?
- **You choose how to feel.** It may not always seem that way! But your feelings and thoughts and beliefs are all linked.
- Your current feelings when things take 'too long' are linked to your protective beliefs. What would be a more supportive thing to belief instead?



Mindset block:

What is the perfect planner to help me take action and stay on track?



Which planner should I use?

Practical notes:

I've moved in the last couple of years to doing all my planning on digital tools, mainly because it has to be shared with team members. But previously I have been heavily reliant on daily planners.

The planners I love best (and have sent to clients!):

- CEO of My Own Life - great for streamlining priorities
- The Head Plan - more holistic and incorporates wellness

Both have:

- Daily, monthly and weekly planning space
- Reflection prompts
- Journaling space



Date	Book	Podcast	The Core	VIP Days	Mini-course	Mastermind	JSN
w/c 4 th October	Finish first draft and send to BETA readers	Invite guests to book slots	Send notebooks Record 'overwhelm' and 'principles of learning' Organise welcome meet up on Friday	Share about my stay at The Marker	Film a welcome video for new sign ups Trail with blog		
w/c 11 th October		Record solo episode 1			SELL Film week 1 video		
w/c 18 th October		Record solo episode 2			SELL		
w/c 25 th October				Share about VIP Day in London	SELL Create workbooks		
w/c 1 st November	Cover finalised Panel design and writing BETA reader feedback received. Second draft underway.				Film week 2 video Film week 3 video Finalise Week 2 workbook		Research and finalise new version of offer
w/c 8 th November	Send an unedited chapter to Briony for design	Record solo episode 3 Record solo episode 4			Film week 4 video Finalise Week 3 workbook		Write sales page for new version
w/c 15 th November	Send book to Erin for editing.	Record solo episode 5			Finalise Week 4 workbook	Basic research on what to include	
w/c 22 nd November	Editing				Prepare follow up offer for JSN	Put together leaflet	
w/c 29 th November	Editing		Half way point check-ins			Put together hit list	Draw up a list of all members and ex-members to communicate change in the NY



Which planner should I use?

Self-belief notes:

Making your actions happen does not require a planner.
Or another planner. OR ANOTHER ONE

A planner and some sort of system definitely *can* and *do* help. But it doesn't need to be complicated, expensive or fancy.

And there is **no perfect one**. You are going to have to experiment (and actually use!) the ones you have to find what suits **you**.

Making your actions happen requires is you to stick to a process, keep showing up over and over, and addressing your self-doubt when it tries to side-track you into the Ps of resistance e.g. perfectionism, paralysis, procrastination.

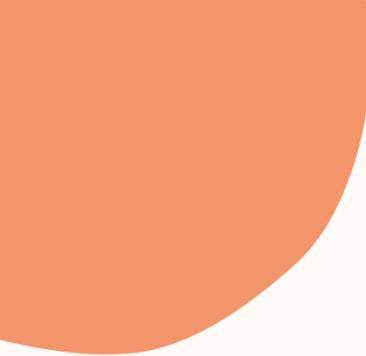


Vision

Yearly intentions

90 day goals

Weekly / daily actions

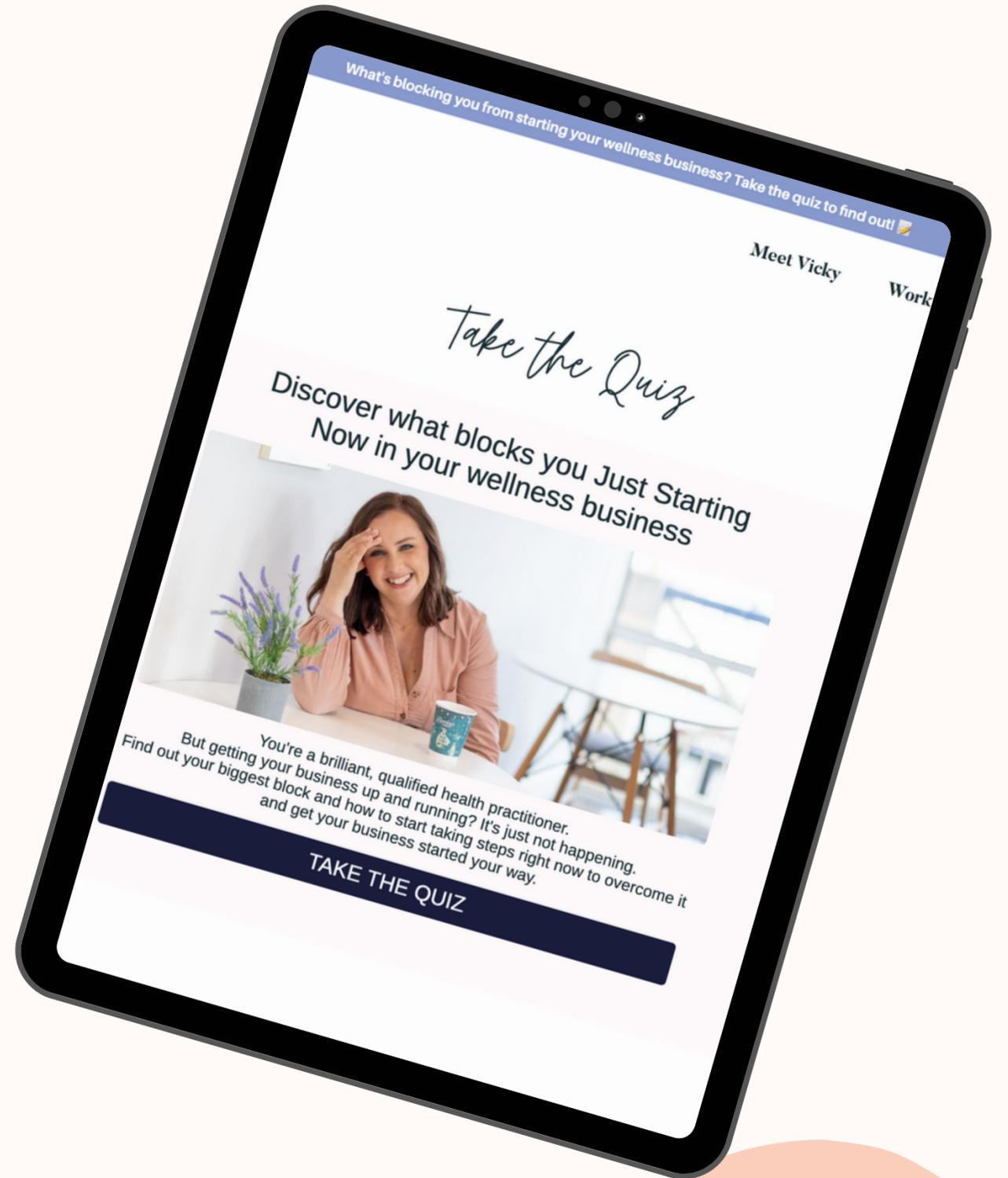


How to plan your wellness business goals – and achieve them!



1. Visualise
2. Set intentions for the year
3. Break it down into 90 day goals
4. Plan your actions
5. Uncover your protective beliefs

What's blocking you in your wellness business?



Take my quiz and get a free training to help you work through the block that's holding you back
<https://vickyshilling.com/quiz>





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