

Momentum

Playbook 1

Know Your End Game

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Playbook 1:

Know Your End Game

Guess what? You're going on vacation!

Pack up, get the kids ready, hold all your mail and get on that plane.

Whoa, slow down, Sparky.....did you forget something?

Where are you going?

"What difference does it make?" you snap back. "All I need to know is that I'm going on vacation!"

Well, if you don't know where you're going.....

...how do you know what to pack? Cute après-ski parka and mittens or stylish swimsuit and sunscreen?

...how do you know if taking a plane is the best way to get there? If it's two hours away by car, you'll get there faster if you drive.

This may sound ridiculous, but this is what entrepreneurs do with their business and marketing choices **EVERY SINGLE DAY.**

I need a Facebook page! *Why?*

I need to attend that networking event! *Why?*

I need to build an online course! *Why?*

I need to send out a press release! *Why?*

Too many business owners start with the tactics rather than the reason and the strategy first. How can you possibly get there you want to go if you just hop in the car and start driving before consulting the map?

IMPORTANT! I'm going to use the term "business" throughout this program. But your "business" could simply be your work, project, cause...even your book, platform or art. Many of you do indeed run traditional businesses. But it doesn't matter if you're an author, freelancer, coach, consultant, non-profit organizer or artist. If you are seeking to attract fans, generate money, and sell your products, services or ideas to others, this is what I mean when I say "business."

Brand vs. Marketing

Let's start off this MOMENTUM course with a primer on the difference between "brand" and "marketing." Only then can you know what you're doing and where you're going.

BRAND is your core, your essence, your story. It's the foundation of everything you do in your work, not just your marketing plan. Brand is who you are, and sets expectations on the value you offer, to whom you offer it, and HOW you offer it. It's the position you occupy in people's minds, as compared to other alternatives or competition.

Brand is the promise you make to the world.

Brand informs not just your marketing plan, but your EVERYTHING plan: hiring, recruiting, partnerships, culture, customer service policies, advertising...in some cases, [office layout and décor](#).

Marketing is just one function of your business that is informed by your brand. Marketing consists of the 4 P's: *Product, Price, Place, Promotion*.

Product (Service): What you sell

Price: How much it costs

Place: How it is delivered or where it can be found

Promotion: How you let people know it exists

Many small businesses get stuck on thinking that marketing is just the last P, *Promotion*. And the tactics we all know and love are part of that last P: social media, advertising, events, PR.

Don't make the mistake of thinking marketing is "just" promotion, or that brand is "just" marketing. If you do, you'll find yourself hiring the wrong consultants, investing in the wrong tactics and expecting the wrong results!

Your brand is conveyed in three important ways:

1. Visually: Your logo, colors, design, website
2. Verbally: Your messaging, copy, voice, elevator pitch
3. Experientially: What it's actually like to do business with you. This can include your impact, policies, customer service, quality, buying process, etc. Is what you promised visually and verbally actually delivered?

Through the course of this year, we're going to work on your brand strategy foundation and also tackle specific tactics each week in all of these categories (including, but not limited to, pure marketing!) that convey that brand to the world.

Here's the simple truth:

Effective branding is not about how much money you spend, but on how clearly and consistently you communicate the right message to the right people at the right time, through everything that you do.

Most importantly, effective branding starts with knowing your goals.

Goal-Setting Revisited

Let's start Week 1 off with your goals. Your end game. The brand you build...heck, the business that you build...and the marketing you do is completely dependent on your goals. If you don't know your destination, you'll end up wandering aimlessly.

But we're going to talk about a few different kinds of goals. And a few different ways to frame them!

Your Business Goals:

Some examples of these are:

Make \$100,000 in revenue this year
Launch a new coaching program by December.
Sell 2000 necklaces through my online shop
Get 3 new customers in the X market
Book five speaking engagements
Get press in my local paper or TV news program
Get one article published on Entrepreneur.com
Sell 5000 books
Hold an art show at my local gallery by the end of the year
Revamp my website by March

These are data-driven, measureable, time-based....all that good stuff.

You can either use goals you've already set for the year, or you can create goals for the year we're together in MOMENTUM. Up to you.

Try to just stick to three to five major goals for now. Less goals = more focus. More focus = better odds of making them happen.

This year, my business goals are to:

1. _____
2. _____
3. _____
4. _____
5. _____

Your Soul Goals:

Business goals are necessary, to be sure, but let's face it: they don't make your heart skip a beat like a rousing anthem or a shoe sale at Nordstrom.

We all have goals that light us up and spark a twinkle in our eyes when we share them—and by nature, are more subjective and fuzzy. Goals about what we want to do with our lives. Goals about how our business will fit into our relationships or how our work will make us feel. Goals about all the lives we'll improve or the impact we will have on making the world a better place.

These are your *soul goals*. My friend, publicity expert [Melissa Cassera](#), sometimes calls this your Happy Plan. What do you want to achieve that is, in some cases, intangible (you know it when you see or feel it) but utterly spine-tingling? Goals that make you feel all warm and happy inside. These are the goals that will keep you going when the going gets tough. They form your vision.

For many of us, the reasons we work for ourselves go above and beyond pure monetary reward. It could be freedom, flexibility, control, impact....anything.

Yes, some of these *could* have measures attached, for sure. But for now let's just bask in jotting down the goals that electrify us like a margarita buzz and worry about the "how" later!

Why are we doing this? **Because what you keep in the front of your mind is what gets your attention. And what gets your attention is where your actions lead you.**

Some examples of these are:

Create a business that is flexible enough to help me spend more time with my kids.

Create a business I can pass on to my children.

Sell my business and retire early.

Devote more time to writing and journaling.

Work only three days per week so I can volunteer at my local animal shelter.

Make meditation a daily practice.

Impact lives of at-risk youth.

Gain a reputation as the go-to resource in my industry.

Be financially independent from my partner.

End my workday at 5 p.m. every day so I can enjoy “me” time.

Schedule a date night once a week with my partner.

Make enough money to take 3 weeks off in Fiji next summer!

Only offer services that are a joy to do...and ditch the rest.

Earn enough money to take a year off to travel/buy a new house

If vision boards are your scene, you could even create a Soul Goals board on Pinterest. Or go low-tech and cut out magazine pictures that speak to you, paste them into a collage on poster board, and tack this up by your desk.

This year, my soul goals are to:

Your Themes for the Year

A few years ago, I ditched traditional New Year's resolutions and opted for themes. I'd heard this technique from various people and decided to try it. Yes, I had some measurable goals, but I stopped making ridiculous bulleted lists of tasks and instead, identified what I wanted to attract overall in a very abstract sense. Self-help guru and business muse [Danielle Laporte](#) calls a version of this *Core Desired Feelings*. For myself, it's not just about feelings but what I want to bring into my life or business in a given year.

Like any [good theme song](#), identifying themes can set the tone for your entire year. You can use them as a guidepost for making decisions. They are also a great sanity check on a monthly or even weekly basis: are you engaging in activities that actually align with your themes?

For example, the first year I did this, my themes were Creativity and Abundance. That year, I got accepted into a prestigious summer acting program where I flexed many creative muscles and got oodles of new ideas for my writing and work. I approached my business from an abundance mentality and attracted all kinds of interesting clients with little effort....and I got pregnant (doesn't get more abundant than that!).

Another year, retrenchment was my focus, as I was suffering from burnout. So my themes this year are Flow, Joy, Creativity and Connection. And, after attending a retreat, I layered in three emotional "themes" of Nourished, Fulfilled and Aligned.

Not loving the woo woo mumbo jumbo I'm using? Let me bottom line it for you: Calm down, do less, nurture existing connections and explore my creativity.

If you like this goal-setting approach, here are some helpful prompts you can use:

What do I want more of in my life and work?

What do I crave?

How do I want to feel at the end of every day?

What does my mind, heart or health need more of this year?

What do I find myself being attracted to? (for example, quiet solitary work time or huge, loud excited groups of people)

This year, my three themes that will guide my work and life are:

1. _____
2. _____
3. _____

What Does Success Look Like?

Now that you've thought through business goals, soul goals and themes, can you combine them or summarize for yourself what success looks like? When you imagine yourself being "successful", what does your daily or yearly life look like?

What I'm not going to tell you to do is "think big." You certainly can! But sometimes this pressures us to define success in other people's terms. Such as....

I have to be a #1 New York Times best-selling author, run a successful business that grows year-over-year and eventually goes public, do constant media interviews, write a witty blog that is read by millions, create a branded line of products, produce my own podcast, cook organic dinners for my family from scratch every night, workout every morning, and make \$10 million a year with a private plane, boat and house in Tuscany!

By all means, if this is your definition of success, embrace it. But please know **success is defined by your terms, not society's.**

Maybe you see success as running a profitable business that allows you the flexibility and freedom to coach your kid's soccer team. Maybe success is owning your own home, any size home—or on the flip side, it could be *never* owning a home so that you're not tied down. Maybe success is feeling financially stable and having enough for retirement.

For me, success is having the flexibility to enjoy a leisurely breakfast with my toddler, send him to a loving daycare where he can learn and make lots of friends, come home to sip on latte in my home office, doing work I love with good, kind, smart people with whom I enjoy working. It is staying focused on my health with Crossfit a few times a week, dog walks and family hikes. It is having a platform to impact and inspire people to do good in the world and share their stories. It's running a business that gives me time to write, act and enjoy my son. It's creating a life with my husband so that we both have jobs we enjoy and time for each other. It's having enough money to pay the bills comfortably every month, plus extra for charitable giving, travel, wine, little extravagances, retirement and my son's college fund.

Success, for me, is NOT building a multi-million dollar branding agency, working for ginormous multinational clients or working myself to the bone to chase a specific revenue target. This may work for someone else, but that's just not my own personal success equation.

Your definition of success will drive everything you do and every decision you make.

Your turn: Success for me looks like:

What Do I Want from MOMENTUM?

Now I'm going to ask you to laser-focus on our year together. You signed up for this program for a reason, be it specific business goals or a creative injection or perhaps simple curiosity!

To be successful, begin with the end in mind. What do you hope to be able to say one year from now when we say "farewell?" What would make this a good investment of your time, money and soul?

At the end of this MOMENTUM year, I want to:

Congratulations! You have just completed your first MOMENTUM lesson.

Did you feel that little heart flutter? That's your energy sparking and your creative train starting down the track. WOO WOO!

But wait, you're not quite done....

Now: post any or all of your goals in our nurturing Facebook group. Remember, each month I'll be awarding a prize for participation and energy!

We are here to encourage you and provide any feedback. If you're like me, often it's fellow collaborators that help me polish my ideas to a glossy sheen.

Again, I'm going to reward folks all year long, so don't lose your MOMENTUM: Post it now and keep that train moving!

Goodies and Inspirations

If you're a goal-setting addict on a scale akin to what happens when someone sneaks a buttercream-frosted cupcake in to a dieting support group, check out John Lee Dumas' (aka, Entrepreneur on Fire) [Freedom Journal](#). A faux-leather bound book to help you accomplish one specific goal in 100 days. Comes with access to a Facebook community if you like.

[Read this](#) for five tips on how to finish and actually make your wild dreams come true...my interview with friend (and world traveler) entrepreneur and content marketing expert Betsy Talbot., half of [An Uncluttered Life](#).

[Enjoy more nuggets](#) of my hard-earned wit and wisdom on goal setting and time management.

Still can't see your goals or what success looks like? [This tune](#) will get your blood flowing and your heart pounding so you can see clearly!