

# Project Worksheet Guide

## **Project Name: <insert your project name here>**

Give your project a name. It doesn't need to be a big fancy cat or a California surfing spot (!) but if it's got a name it somehow feels more tangible and real.

The rest of this first section (pages 1-2) is intended to act as your guide - with notes on how to complete each section of the worksheet.

Pages 3-4 contains the Case Study that we used as part of the Ultimate Training Session and then finally there is a blank Project Worksheet on page 5 so that you start planning your own projects!

---

### WHAT do I want?

Be as specific as you possibly can in describing what you want the outcome of this project to be. Think about WHAT you want done, WHO might be involved with the outcome, WHERE it needs to happen and of course WHEN you want it by.

You can also come at this question from Stephen Covey's "Begin with the end in mind" approach and describe what the end result is for you.

---

### WHY do I want this project to be completed?

What is your motivation for getting this project done? What will it lead to: more money, more clients, more people of your list, a speaking gig? You are really thinking about what is possible for you or what will you be able to do once this project is complete. Knowing what you need this project for can be a powerful "pull forward" to getting going.

This question also can uncover when you haven't really thought through a particular project well enough. If you don't know why you need to do something - then the question really becomes - why do it at all?

---

### HOW will I know when I've got what I want?

This is where you get your inner "CSI" on - looking for evidence! What evidence will you have to know that you are done? What will you be able to see, hear, feel, smell or taste. Your evidence may something direct and tangible or it may be metaphorical. Either way using your senses to describe the end result will make it very real.

# Project Worksheet Guide

---

WHAT has already been done?

We often forget work that we, or someone else, has already done on the project. Even just the smallest note from some research that you did months ago is something that can help you move towards the end result.

And really don't discount anything that you've done - as you review and assess all the materials you have, some new and interesting ideas are bound to crop up and maybe generate even more new ideas about what is possible.

---

WHAT has been stopping me from doing this?

This is a chance for you to really look at what's been happening that may have caused you to not take this project forwards. Often it's a chance for to see where we are really in need of help and is a great starting point in surfacing any fears you might have about starting or even completing the project.

Remember no one but you has to see this project worksheet. It can be as much of a journaling exercise as a project planning exercise, as we often don't take the time to really sit down with our fears and issues and confront them head on.

---

WHAT can I do next once this project is completed?

Here you want to get a little more specific than when you answered the earlier question about WHY. It's still about motivation to pull you forward but this time you want to think about what project might kick off next immediately following this one.

This is the way to really create forward momentum with your business building activities so that you always have in your sights what is coming next.

---

WHAT is the first (smallest) step I can take?

Creating an actual plan can be the hardest thing to do when you are not the one who knows what actually has to be done. That's why starting with the smallest step you can think of will often be enough to get you over the hump of what has been stopping you and into first gear.

This first step should be something that is under your control and management, and that you can do easily and with very little effort. That's how all projects, get going!

# Project Worksheet Guide

## **Project Name: Implement Web Site Opt-in Form**

---

### WHAT do I want?

A way for people to opt-in to my list from my website so that they can receive more information from me about what I do on a more regular basis. I'd like this to be done within the next 30 days.

---

### WHY do I want this project to be completed?

I want to grow my list by 1000 people over the next 6 months. Right now I have just 200 people and I really want to increase that. I can keep growing it slowly through networking and meeting people in person but in order to find more potential clients I need more people on my list.

Also everyone keeps telling me that 1000 people is like a magical critical mass for really starting to see my business grow.

---

### HOW will I know when I've got what I want?

I will see an opt-in form (first name and email) on the front page and most of the other pages on my website (anywhere with a sidebar?). I will be receiving almost-daily emails from Mailchimp telling me that that my list has increased in size. I will see more comments on my blog posts and my google analytics account will show an increase in traffic to the pages on my site.

---

### WHAT has already been done?

I have an almost complete free report that I can offer in exchange for people's name and email - my ethical bribe/pink spoon. I would say I need to spend another 3-4 hours finishing it up in terms of content, but of course I haven't got a decent looking word template so I'd need to do that as well. But then maybe that is something I get the person I want to hire to do for me as part of this project?

I have a mailchimp account and a list already set up for people that I've met through networking meetings. It might be a good idea to know if someone joined my list because I met them in person or because they signed up via my website.

# Project Worksheet Guide

---

WHAT has stopped me from doing this?

Finding the time to understand how to get the form set up on my web site has been a real challenge. I know I could figure out how to do it, but I'm not that great when it comes to fiddly technical things - it takes me a while to understand these things properly. I'm also a bit apprehensive about breaking something on my website. I know everyone says Wordpress is easy, but I'm not a geek! It's OK doing my blog but any more than that and I freak out.

I've also been worried that I can't afford to hire someone to do this for me. A lot of my friends have had bad VA experiences and don't really have anyone they would solidly recommend to me.

Also I've only ever seen VA's quote hourly rates and monthly retainer packages and say that they don't take on one-off jobs, so how on earth do people get to know if they can work with them. Basically it's a lot of apprehension on my part that has really held me back.

---

WHAT can I do next once this project is completed?

I can start publishing a regular newsletter - just once every 2 weeks to start with will be enough. But that means I can provide a summary of my recent blog posts, I can let people know what I'll be doing, I could provide resources and most importantly I can start making offers. That would be really exciting!

---

WHAT is the first (smallest) step I can take?

Now I'm really excited about getting this project done - so much so that here are the most urgent things that I need to get done to get this moving:

- Complete the research for my special report and write the final version (remember it doesn't have to be perfect)
- Create an ad that I can circulate for help with just this project (looking to date a prospective VA) - have all the details I need from this project worksheet, just need to describe the type of person I am looking for.
- Find an MS Word template for the special report that I can customize with my colors.

# Project Worksheet Guide

**Project Name: <insert your project name here>**

---

WHAT do I want?

---

WHY do I want this project to be completed?

---

HOW will I know when I've got what I want?

---

WHAT has already been done?

---

WHAT has stopped me from doing this?

---

WHAT can I do next once this project is completed?

---

WHAT is the first (smallest) step I can take?