

Ep #315: The Three-Year Plan



Full Episode Transcript

With Your Host

Stacey Boehman

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

Welcome to the *Make Money as a Life Coach*® podcast where sales expert and master coach Stacey Boehman teaches you how to make your first 2K, 20K, and 200K using her proven formula.

Hey, coaches. Welcome to Episode 315. Today, we're going to talk about The Three-Year Plan. This is one of my favorite concepts, courses, tools that I've ever created in my business. I'm going to just walk you through what it is and how I use it. And I'm really going to talk about it from the lens of a seven-figure business.

We're going to be enrolling soon for the 2 Million Group. And I feel like I haven't done a lot of podcast episodes for my multiple six-figure and seven-figure clientele. And so I wanted to use a couple of the next episodes to really talk about some seven-figure concepts.

And also, Happy New Year. This is the first episode I am recording in the new year. So before we dive in, I hope you had an amazing holiday season. If you celebrate, I hope that you hit all of your goals in 2024. And if you didn't, I hope you know exactly why you have resilience and excitement and desire to tackle it this year. I hope you're excited for this year.

I am so pumped. I just got off a call earlier today with my 2 Million Group and we were just all in this place of knowing that this was going to be our best years, all of us, our best years yet. And so we're all really just brimming with excitement. It's a really fun room to coach.

So that's what's happening with us. We're in SBC. We are in full planning mode. I've even worked on my break and have been creating a lot of new things. This is going to be my year of content creation and intellectual property and really getting 10 years of business wisdom out of my brain and into the world for you all.

So I am right now working on a course called The Launch Audit. I'm working on a new entrepreneurs two, new entrepreneur series courses. And then I'm also gonna be starting 200K Mastermind's Mastermind Week at the end of January, and then 2 Million Groups Mastermind Week. So

[Make Money as a Life Coach](#)®, a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

we're gonna be kicking off both those masterminds at the beginning of the year. And then I'm gonna be sharing some new things that are coming out. So lots of exciting behind the scenes things. And one of those things that I work on behind the scenes is The Three-Year Plan.

I do this every year. Sometimes I do it multiple times a year. I really like to be up to date and take as I grow, as I evolve, as I change, I like to update the plan. It doesn't stay stagnant for a year. I don't do it for a year and then leave it. I really like to use it as kind of a thought partner in my business and a guidance system for me and my business.

So what it is. So The Three-Year Plan, I have done a podcast on this before, but this was really before it evolved into an entire course. And before I expanded the plan itself, it is now an entire course and workbook and really much more extensive than the original essential Three-Year Plan that I created. And so I hadn't created that yet when I recorded the first episode about The Three-Year Plan podcast with my COO. So you can go back and listen to that if you would like. But this episode is really going to dive, instead of a conversation with a team member and really talking about our Three-Year Plan and how we Three-Year Plan, this one's really just going to break down the idea, the concept behind it, and why it's so important.

So The Three-Year Plan is a plan, literally, for the next three years of your business. My names of my programs and my courses and the things I create are typically very matter of fact. It is what it says it is. So it is a plan for your next three years of business within every three years in business.

So this year is actually going to mark a decade in business, which is really exciting. So I have done approximately 3, Three-Year Plans. I wasn't doing this at the beginning of my business, but I have worked through several Three-Year Plans. So I've done this several times.

So within every three years of your business, if you take it in a Three-Year chunk, or even like 4 years or 2 years. It doesn't matter. I love the idea of three years. I love having that extra year not being 2. So within each of the

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

three years of your business, there will be hard years, there will be years that don't go as planned. There will be years that exceed far beyond your expectations. And The Three-Year Plan keeps you anchored, focused, and working towards something much bigger than the current moment.

I created it to help me stay in the infinite mindset, to focus more on, to care more about, and to prioritize three years from now over this year. And what that really does is get you out of short-term decision-making and into long-term decision-making, into infinite decision-making. If you were gonna be in business infinitely, if you were at this for life, if you were committed for the next three years, whatever helps you kind of lock in to a much longer-term thinking than just right now.

And when you scale to a million, this is the most important way to think. I think we've talked about this in the last few 2 Million Group calls that I've had with my students. This has come up that this is the most important way to think. Infinitely long-term decision-making as it – like every decision you start examining how would I make this as if this were going to be the first, last, and only time I make this decision. If I'm really going to think it through, I'm really going to give it some due diligence." It takes you out of that putting out fires, everything is urgent and important mindset that I think a lot of six-figure and multiple six-figure earners have.

It slows your decision-making process down and also it improves it and then revenue follows. So to go to a million, you have to be playing the longer game. I really think it's the hardest thing to teach someone how to think like this. So again, at six figures or multiple six figures, you get used to making really fast decisions. It's like a little addiction to the money rolling in and to blowing your own mind and launch after launch and I've doubled my revenue and then I doubled it again and then I doubled it again. It's very in the now. It's in the like, look what I can do, look at me go, I'm in the current, I'm selling like crazy, I'm blowing my mind. It's just like a very different energy. But the biggest switch to go to a million was this, slowing down my thinking. Being more deliberate about what I work on, what I give energy to in my business, what skills I decide to work on developing when,

Ep #315: The Three-Year Plan

like in order of when I develop them, what back-end business projects I take on, what intellectual property I create, what offers I sell, who I hire and when, all of this has been guided by thinking bigger, thinking beyond, building out a plan and working diligently with full belief to execute it.

It requires more patience, more commitment, and more resilience to work towards a Three-Year Plan because you're not getting instant gratification. You're not getting instant results. Now you can see that if you're doing it correctly, if it's not even if you're doing it correctly, if it's working, if your plan is just going according to plan, then in order to accomplish your Three-Year goal, you will have estimations of what you'll do in year one, year two, and year three. And so if you're on track this current year of 2025, it will show you that your Three-Year Plan is inevitable.

But the way I've always taught it is it's also very flexible. If you thought you were going to do a million in year one of your Three-Year Plan, and then two in year two, and then five in year three, and you only do \$800,000 in year one, but then you do 2.5 the next year, it doesn't matter.

And when you get to this level at a million dollars, you have to start thinking that way, that it's not just about, oh, I hit my goal or I didn't. I made the million or I didn't. It's about I'm creating a multi-million dollar business over the next three years, and I want to do it in a way that business is sustainable, because how I get there will be how I am there.

But the brilliance of this plan that I really love the most of thinking three years ahead, going way beyond the current moment, thinking bigger, is it requires you to build sufficiency. You want something at the end of that three years, you won't have it for three whole years.

And if you want the three years to feel really fun, exciting, purposeful, fulfilled, you have to get good at wanting and working towards and recognizing that the working towards is the whole point. Like you have to get really good at that, at wanting things, working towards things, becoming someone and something, being in the middle. I call this the difference of working versus accomplished results. We live in working results. We're

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

working towards a result. We don't live in accomplished results. If you do, your life becomes very small. It's all about what you have done.

And we all know those people that have one big accomplishment. They always talk about it all the time, but it's the only one. My husband is so funny. This is a joke. But he always says he peaked in life when he was like, I don't remember, 12 years old, and he struck out nine out of 10 batters or something crazy. But he tells the story all the time. And it's so funny. He's always like, that day, that was my day, I peaked in life.

But we actually do know those people who really do like stay in their accomplished result and they love that accomplished result and they talk about that accomplished result all the time. Like they made \$100,000 or they made \$200,000 and they talk about that over and over but they are not really going for \$300,000 or \$400,000 or \$500,000 or a million.

And so unless you are in that place where you are kind of stuck in your accomplished result, most of you, most of us as evolving creatures will be working towards a result. So The Three-Year Plan really teaches you how to be sufficient in that. Again, how to have fun in that, how to make that exciting, how to make that purposeful, how to feel fulfilled while not having fulfilled yet your Three-Year Plan. And really knowing that the having doesn't create what you think it will for you. It's in the becoming the who, the what you create, that is actually what brings the fulfillment in the first place. The idea of creating a new version of you.

So one of my main rules for my plan or a main structure for how I do mine is I create them for the person I want to become as much as the revenue I want to create.

I always say this and I know that some of you don't believe me, but there gets to be a point where you can't push yourself for more money that just sits in a bank account. Even if you're putting it in investments and it's compounding, some people can do that. But I think a lot of us who got into this world to be coaches and into personal development, that is actually what we crave the most is that personal involvement. That's actually the

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

high that we get. Now we do also get it as entrepreneurs from money, but some of you don't get that as strongly as you do the personal evolution because I talk to you all about it all the time.

I tend to get it from both. I think it's very exciting to grow wealth for sure. My husband and I are working very hard to stack and grow our net worth and we're super excited about it. We talk about it a lot and we are now as giddy to get on and make investments and look at our investment accounts as we used to be to take a big fancy trip. So there is a push there. I have big goals there.

But when I think of creating a \$20 million business, a \$30 million business, I now know what that's going to require. And especially being a mom and having new priorities and a new agenda that really pulls me in life, I would only do that for who I know I'll need to become to achieve that. And the overall value that person will add to my life experience. The person I will become that will then create a new life experience for myself and my family.

So planning three years at a time this way and accessing that who makes it so much easier than also for me to figure out the how. Every single time I help a client step into their self-concept and see themselves differently, the how becomes very easy, very simple.

So for example, who you might need to become to make a million dollars or I did this when I was thinking about myself going to \$20 million, \$30 million. And even now, like I see myself, I've been working on this in my last Three-Year Plan. Even though my revenue isn't at \$20 or \$30 million, I've been working on becoming this person who could create it. And I'm seeing this already. So this was part of one of my recent Three-Year Plans.

But now I need to become someone who solves problems quickly and simply, someone who is highly resilient, someone who is very mentally tough and emotionally elastic. That's the way I like to think about it, is just capable of a very wide range of feeling and processing a very wide range of emotions. Someone who works very purposefully and someone who is very skilled at marketing, selling, and coaching.

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

Every marketing, selling, and coaching problem is very easy for me to solve because that's who I work with. I work with coaches, so they're always marketing, selling, and delivering. So I want to be always someone who receives the problems they have, and it feels so small and simple to me.

I have to be a thought leader, someone whose voice changes and impacts an entire industry, someone who balances work and life really well, because that's what my clients want. And someone who manages a team well. Someone who creates great company culture. Someone who fosters growth in others.

And then I have a lot... I would go into a lot more detail. I have a lot of big goals for how I want my team to impact my clients and how I want my company culture and my customer service to impact clients. It goes much deeper. But I'm just giving you an example of how I think about who I'm becoming.

And so I've been doing that. I've been working on these skill sets for the last three years, like really seeing myself as someone that is a change maker for a lot of people. And again, someone who solves problems quickly and thinks things through simply.

I took over my operations and my management this year and I started learning things in my business. Really intricate things, updating company manuals. I've had to learn to do a lot of things this year and I've had to just tell myself this is going to be simple. I'm going to figure it out easily.

My husband has had to also, alongside me, do these exact same things with figuring out, calling different states and talking to their, I don't even know what you would call it, but like government departments of payroll and things like that when we off-board an employee or onboard an employee and we don't have one in that state. And so we're always like learning new things.

So I get really clear on the traits that the person who has accomplished what I want to accomplish would have.

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

These become not only really the how, like the direction, because the who creates the how, but they also become my why, like a very strong why to fulfill my Three-Year Plan. And I do love thinking about what it will be like when I have new business skill sets. That's something that's been really fun for my husband and I, as we learn about, again, running new things in the company, as we figure out big problems, as we create things that used to feel overwhelming and then we can do them now very quickly. That feels very fun for me. As I get more skilled and proficient at doing all things. It's a huge confident booster. It's so fun to feel so experienced.

And really, what I was thinking about when I was contemplating The Three-Year Plan and why it's so valuable and so important is it really just continuously helps me be the most capable version of myself. And I love that version of myself. I don't love the incapable version of myself. The incapable version of myself is very small, whiny, victim-y, makes lots of excuses, has lots of friction, lots of reasons why she can't succeed. There's always things coming up. Like y'all know the less capable version of yourself, right? If you've ever explored that, that would be something fun to explore. Maybe not so fun, but definitely eye-opening.

When I think about the not capable version of myself, and then I think of the capable version of myself, it's like there's just hands down. It's not even a remote competition. I always want to move towards and evolve towards the most capable version of myself at every single level. I love that version of me. So factoring in who I'm going to become, what skills I'm going to create, what proficiencies I will have, and the results that will be created both in my personal and my business life, doing all of those things, thinking far enough ahead, creates a compounding value and desire to my plan. And that value and desire carries me through the hardest challenges. It's literally the deepest why far beyond the money. And the more desire you have going through the hardest challenges, like for example, breaking through and doing that first scale and getting to your first million, having that deep anchored why, that deep anchored value of why you would even work so hard to do that, why you would overcome all the things to do that,

Ep #315: The Three-Year Plan

having that desire, that's what's going to get you through. It for sure got me through to my first million.

And then finally, why The Three-Year Plan matters so much is that, and this is really important, I talk about this a lot at all levels of my business in every room that I teach, is that The Three-Year Plan helps you properly estimate the amount of effort required to accomplish one year's revenue.

So I say this a lot at all levels, we fail only ever because we improperly estimate the amount of time, energy, and learning that something will take, the level of skill that something will require. That's the only reason. We have an estimate in our brain, then it doesn't happen, we freak out, and then we give up. Or we keep trying in the freakout and the freakout affects the trying and then impacts the results.

So what I love if you create a Three-Year Plan is that what is on the plan for three years from now, much needs to actually be started this year. So an example of that might be one of the skills that you have to go to a million is the ability to sell without doing sales calls. You just can't take a million dollars worth of sales calls. They eat your energy up to be marketing and bringing new people into the business. And they keep you from being able to deliver and create better delivery.

Even if you could, I don't think you could actually schedule enough sales calls. Or it would be... I don't know that it would be a worthy time spent to try to sales call your way to a million dollars. So that would go in The Three-Year Plan, either in year one, two, or three, depending on where you are in your scale.

So some people come into a 2 Million Group, and I start at... I started my scale at \$300,000. So they might come in at \$250,000, \$300,000. And then they might decide... Some people will say, I'm going straight to a million.

I feel like I can handle it. I'm ready to work really hard. I'm ready for this to be an all-in year. And then some of them are like, "Well, I want to do \$300K again, but I want to do it without doing sales calls." And then some people

Ep #315: The Three-Year Plan

are like, "I want to do \$600K in year one, and I want to do it without doing sales calls." Or "I want to do \$600K in year one and I'm going to do sales calls. And then in year two, I'm going to do a million and I'm not going to do sales calls."

So everybody has a different set of revenue and what they're working on and where that million dollars will fall in their Three-Year Plan. So I have a client now that getting off of consult calls is on their two-year plan. We just talked about it. So they know that to make that happen, they need to get really good at selling on consults. Because if you can't close someone talking to them directly, the chances of you knowing what to say and how to say it in an email or a webinar is very low.

And when your consults are closing at a really high percentage, and they start feeling like a formality and people are sold 80% by the time they get on the call with you, that's when you figured out what to say. And then all you have to do is figure out how to do that via emails and webinars and group sales calls.

So you want to be really good at speaking to people on the phone, closing calls. Typically that is the skill that will develop selling off of consoles. So thinking farther out and knowing you want to be off sales calls to make a million dollars by the end of this year or the beginning of next year, then suddenly the importance of mastering conversions becomes extra important right now. Because now you see it as the thing that helps you fulfill year two of your Three-Year Plan and your million-dollar goal.

And so that's what my client and I were talking about. It's like, let's make this year the year where he also just restructured all of his business and is creating intellectual property and working on better, faster results.

And so we've really worked on this is going to be the year where you close out almost a million dollars of business on sales calls. Not quite, like a little over half a million dollars on sales calls. And then the next year, let's do a million without sales calls. That knowing, I'm working towards this and this

Ep #315: The Three-Year Plan

is the thing that matters the most right now to make me get there makes you infinitely faster at achieving goals. So important.

Now here's how I don't use it. I think this would be really useful as well. I do not use my Three-Year Plan to speed myself up and try to solve everything at once. I use it for sustainability and sufficiency. I can see all of the work that would need to be done and feel okay.

Part of being a CEO is something else I talk about a lot in **\$2M Group** is you have to get really good at seeing a million improvement projects and knowing you can work on about three at a time. And having sufficiency and fun and calm knowing that you just can't get to everything.

Like there are so many times where my Slack is like full of messages. I haven't responded to people and I don't stay working until 8pm to respond to people. It's just not what I do. I get really essential about what matters most. So I have to be okay with some people are waiting to hear from me for things, or some things haven't been finished.

So I don't use it to solve everything at once and try to like really speed myself up and hustle. I also don't use it to stress about the amount of work to be done. Super unuseful, it should only feel inspiring. And I don't use it to bypass skills and results I need to create first.

So if I want an evergreen funnel, if you wanted an evergreen funnel in the next three years, The Three-Year Plan is not created for you to skip ahead and just start creating that now. Like, oh, I know I want to have an evergreen funnel year three, so let me just start working on that now.

What I would do is look at all the skills, knowledge, and assets you'll need to have that in place to make that work. So for example, you might need a webinar that converts really well. Gotta have that first.

If you want to have an evergreen funnel, you have to know how to sell off consults. So you have to be able to sell through emails and through

Ep #315: The Three-Year Plan

webinars. And maybe before that, you need to know how to launch and actually fill your launches and hit the goals you set.

Because if you set a goal and you do an actual open launch to your list or to your audience, and you don't fulfill it, the idea of like, I'm just going to build a business on evergreen, you don't know what to say to get people to take action in a launch. You won't know what to say to get people to take action.

In an evergreen funnel, it's even harder to get people to take an action in an evergreen funnel than it is during a launch because a launch is live, it has deadlines. An evergreen funnel, it's like they can buy really any time. You have like artificial kind of deadlines.

You have like... For mine, if you take my free training that I have on my website, if you join 2K for 2K, within the time period, we mail you hard copies of some of the program's like top resources. So like that's a built-in urgency we have. And right now 2K for 2K is open all the time, so it literally is like this three-day window where people can buy.

But it is harder to do to create that urgency in an evergreen funnel. So maybe the thing that you need to get really good at this year is launches. So it's not meant to bypass, it's meant to help you reverse engineer and make sure you build up all of those proficiencies so by the time you do get to year three and you're ready to do evergreen funnels, you now know how to sell through emails and webinars, and you're not doing consults anymore, and you have a webinar that converts really well, and you are really good at launching and filling up your launches and hitting all your goals.

And so then putting an evergreen funnel together feels inevitable. It just feels like, oh yeah, this is who I am. Why, I'm just gonna do it. So you don't use it to bypass, you use it to reverse engineer and build up. And then I also never use it to despair. If I'm off track of my Three-Year Plan, that's okay.

Ep #315: The Three-Year Plan

Because number one, sometimes you have a year that's much bigger than you anticipated. In one of my Three-Year Plans, my goal was to make \$1 million. I did \$860,000 instead of \$1 million. And I was very sad about that. Trust me, if you get to that point and you make \$860,000 instead of \$1 million, you're going to be like, it's just so frustrating when you get that close and you're like, I really couldn't do another \$140,000 of business. And then you start thinking back to like, well, I could have done a launch then or I could have extended that launch or I could have done this. And it's a little bit of a mindfuckery.

So that year, I remember I didn't do a million, I did 860, but then the next year I did 2.5 million. And on my Three-Year Plan, I believe my Three-Year goal was 5 million. And then I ended up doing 6.4 the next year after that. So I did millions more than I anticipated overall on my Three-Year Plan.

So it's okay to be off track. But also you can give yourself another year because we don't actually know how long something will take. We just arbitrarily decide and then throw an internal tantrum when that arbitrary expectation wasn't met. It makes no sense. So if you need another year, you just give yourself another year. Your arbitrary expectation was off. Nothing has gone wrong.

But in the reverse, I also don't use it to quit on this year's goal halfway through and say, oh, well, I can do that next year. I'll just tack on a little bit of work to next year's. If I'm taking it serious, I literally can't say that because I've already planned what the next year will be. I already have other things I want to move on to next year. So I'm going to fight even harder in the second half of the year.

So I don't use it to give up, but I also don't use it to despair. And I don't use it as a guarantee. A lot of coaches, like I've like had so many conversations and I would say the last two years, a lot of coaches love to believe that money earned in the past plus growing the next year is always guaranteed for the future.

Ep #315: The Three-Year Plan

It's inevitable. If I learn how to make \$200k, I'm guaranteed to make \$200k from here on out and I will always make more than that. So if I made \$200k this year, the next year will be at least \$300k or if I made \$25k last year, whatever it is. For sure I'm going to make that and then some. But a lot of coaches in the last two years have seen the reality of that not being true. If you let go of momentum, it doesn't stay there indefinitely. If you stop doing what's working, it doesn't continue just to work.

By the way, I see this happen a lot at six figures. Clients will come in, they'll make \$100K, but then they'll tell themselves the whole time it's a fluke. I don't actually know how to do this. It was magic. And then if you tell yourself that enough times, then you believe yourself that you don't know how to do it and then they don't repeat it. And the next year it's like \$75K. And they're like, I don't understand what happened. It's like a version of self-sabotage. So if you stop doing what's working, it doesn't continue to work. And just because you were making, you know, "this much" doesn't mean you're going to again.

We aren't entitled to revenue just because we know how to create it. This has been like a huge business lesson that I would love to pass on to everyone. We are not entitled to revenue just because we have done it or know how to create it. Every year, you have to do the work to create it fresh, every year, without entitlement and guarantees. It's entrepreneurship.

If revenue was guaranteed based on the past, no business would ever go out of business. But what they actually say is most businesses don't make it to year five or beyond. Look at Peloton. Skyrocketed in the pandemic. Now they're hanging on for dear life. And it doesn't mean that they can't recover and have a solid business and customer base. I'm one of them and even grow again. But it also doesn't mean that 2021's revenue is going to be the same as 2022's or 2023's or 2024's. So I don't use my plan as a guarantee or expectation. I use it as a plan of hard, inspiring work that I want to do that helps me become the next version of myself.

So one of the things that we were talking about on my 2 Million Group call today was my students' 2025 revenue goals. And I also told them to make

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

net worth goals. I asked them how many thousands, hundreds of thousands, or millions of dollars they wanted to add to their net worth this year. Such a fun thing to think about.

As your business grows bigger, you will really want to factor that into your plan. I love doing a Three-Year Plan for revenue, planning for profit, and for net worth. If you have all of those goals, you won't spend all your money in your business on expenses. Every time you make money, you think you've got to go spend it. You've got to keep reinvesting back into the business, hiring more people. "Oh, I made another \$100K. I need to hire another person. I made another \$500K. I need to hire two more people."

There's something we do at the million-dollar level where you... I've seen this so often where we really create a winningness energy or believe that we're growing and doing it right when the more and more people we can hire. Instead of how can I have a lean as possible business that's easy for me to have quality control over, and I know everybody's using their time well, and there's not too many cooks in the kitchen, and we're very productive? That's where my business is right now.

So if you plan for revenue, profit, and net worth, you'll hang on to your profit instead of constantly, endlessly upgrading the business. And you won't sacrifice net worth for upgrading your lifestyle. And listen, I'm all about upgrading lifestyle. It's just that you want it to be intentional. If you do, you want to know you're doing it. You want to be like planning for it. Like I'm going to have this upgrade. We're going to do this house upgrade, or we're going to do a big vacation upgrade that's going to blow my mind and be like a dream come true. Or I'm going to do a wardrobe upgrade because I want to step into my next positioning or I'm going to redo my office because I want my office to be whatever it is. You want it to be intentional while also thinking about building your network.

So this is The Three-Year Plan. It is a course that I have recorded live. I actually did this live in front of a studio audience, which is so crazy to say. And I recorded it for 200K Mastermind and the 2 Million Group. And then I also created the actual plan, the workbook. And inside of it, it has three

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

Three-Year Plans. So nine years, almost a decade worth of plan inside the workbook so that you can really like keep the same book and just keep going. I think that's really fun. And there's something to that to have all of your plans in one book.

But the plan itself spans 27 pages. There's an essential version inside the advanced selling workbook inside 200K Mastermind. So if you're in 200K Mastermind, you can find the essential version. It's towards the back of the book. You can also locate it using the table of contents. But as you start scaling, you really need the full-scale version. I know it's a lengthy plan, but you really want the full version at the million dollar level or when you're going to the million dollar level. You want to push your brain and expand your brain to answer each of the questions. It really makes you think very deeply about your business.

So what you do is you go through and create your business model and plan for the next three years. Then I take you through a series of questions that I call the current business report. Find out what's happening in the business. Then I take you through a series of questions called the CEO report. And that finds out what's happening with you right now in the business.

Then we take your business plan for the three years and we create your three essentials. This is something I teach in \$200K and 2 Million Group. We take your three skillset essentials, your three result essentials, and we create what will be your focus for each quarter in the coming year to help create that Three-Year Plan. And in the video course and in the workbook, I walk you through examples of the three essentials at every stage in business.

So there's one for if you're wanting to go to your first \$100K, there's one if you're wanting to go to multiple six figures, and there's one if you're wanting to go to seven and multiple seven. So you don't even have to guess this. I'm like, these are the proficiencies, these are the skill sets, these are the results you should have in your business. So if you don't have them, these are the things you wanna be working on in order of importance that matters most to you and feels most useful to your plan. And then you create your

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

plan as the CEO for the future of the next three years and who you're going to be and how you're gonna develop as a CEO.

And then you do this for your team, for those of you that have a team. If you don't have a team, then you ignore that part for now, or you play along and dream up your team. But there is a version for the team plan as well.

And then finally, you look at and plan your money. Very important. You plan your profit, you plan how much money you're going to have in your business reserves, you plan what you're going to save, like you plan all of that. Just putting intention on this is so important. The more intention you put on your money, the more money you're going to have.

So those of you joining me for the next class of 200K Mastermind and 2 Million Dollar Group, we will be going over your Three-Year Plans. If you're already in 200K Mastermind, we've already done that enrollment, you can start on The Three-Year Plan course now if you want and go and create your Three-Year Plan. And then if you're enrolling in 2 Million Group, when we open this January, coming up in the next few weeks, as soon as you enroll, you'll get access and you can also start going through the course and completing your plan and then we're going to coach on them together in our each individual groups and I'll answer any questions about your Three-Year Plan.

And if you're joining in the future to either of the advanced masterminds, you get access to this course on demand when you sign up. So it gives you something really exciting to look forward to and another big value add for being in my advanced rooms.

But I hope this was really helpful. I was thinking about what could be like the best new year topic to talk about and for my first week back and this just I wanted to share all my thoughts about The Three-Year Plan. So I hope it gave you some inspiration, some excitement and helped kind of adjust your mindset for the year.

All right, I will talk to you all next week.

[Make Money as a Life Coach®](#), a podcast with Stacey Boehman

Ep #315: The Three-Year Plan

Hey, if you're ready to make money as a life coach, I want to invite you to join my 2k for 2k program where you're going to make your first \$2,000, the hardest part, using my simple 5-step formula for getting consults and closing new clients. Just head over to www.staceyboehman.com/2kfor2k. We'll see you inside.