Glossary

Every word the planner uses, in alphabetical order. Keep it open while you work.

01 THE WORDS

A to W

Builds UP TO 5
The things you are making this year, such as an offer, a system, or a site.

Cuts UP TO 5
What you are taking off the plate in the next 90 days. Cuts come before next moves, so the plan has room for what you add.

Destination
One sentence about where your practice is a year from now. If you only fill in one thing, fill in this one.

Estimate
The midpoint of a range you chose. The plan labels it as an estimate so you know the number is close, not exact.

Locks UP TO 6
Decisions that are settled and stay settled, such as your client limit or the days you keep for deep work.

Marketing Strategies UP TO 3
The ways work and revenue reach you, such as referrals, speaking, or a newsletter.

Next Moves UP TO 8
Dated actions that turn the year into a quarter. Put the first one on your calendar this week.

Rerun
Coming back each quarter and starting from your last plan. Carry forward what held and cut what did not.

Revenue Evenness
How steady your income runs month to month, so you can see the lean months before they arrive.

Trailing Twelve Months
Your revenue for the last twelve months, counted back from today. It lets each quarterly rerun compare cleanly with the last.

Weekly Schedule
The shape of your week and what belongs on which day.

Where You Stand
Your practice today, including revenue, rate, and how full your weeks are. A range or "I do not know" both count.

Do Not Know a Number? Pick a range or choose "I do not know." The planner fills in an estimate and keeps going.

02 HOW TO USE IT

About twenty minutes



- [x] **Open the Planner**
  Work through the nine steps, one screen at a time.
- [x] **Keep This Page Beside You**
  When a word stops you, look it up here and keep going.
- [ ] **Come Back Each Quarter**
  Start from your last plan, keep what held, and cut what did not.

CUT BEFORE YOU ADD