

# IMPORTANT:

## Almost there!

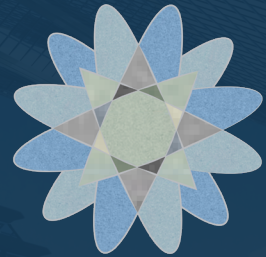
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- Untick all the McAfee boxes on the left. Then choose the top link "Adobe Acrobat Reader DC" - THIS IS A FREE DOWNLOAD. DO NOT SELECT THE TRIAL VERSION
- Download the Goal Setting Workbook. Save the workbook file onto your desktop. Open the workbook by doing one of the following:
  - FOR PC USERS - Right click the downloaded workbook file, look for "Open with" on the pop-up window, and then select "Adobe Acrobat DC".
  - FOR MAC USERS – Go to the Desktop and right-click or ctrl - click the pdf workbook file to open with Adobe Acrobat Reader DC.

**IF YOU ARE HAVING TROUBLE, NOTE THIS IN THE ZOOM CHAT AND YOU WILL BE MOVED TO A BREAKOUT ROOM FOR ASSISTANCE.**







# AROOTAH

## Master Plan for Peak Performance Workbook

*By Rich Bello*

The 10 Step MVP Process  
For High Impact Results





# Foreword

Welcome to the Master Plan for Peak Performance Workshop.

I am thrilled to support you in maximizing your professional objectives and assisting you in putting your potential into action. By showing up today, you're asserting your commitment to growing yourself. You recognize that living below your capability is not supporting you in achieving the fulfilling life you deserve.

The tools within this workbook support you in specifying areas of focus and crafting goals to achieve high-impact results. In this workbook, you will:

1

Clearly define AREAS and CATEGORIES of growth within your Professional Domain.

2

Identify OPPORTUNITIES and SET GOALS to reach your greatest potential.

3

PRIORITIZE maximum leverage by creating a MASTER PLAN to achieve game changing results.

During my 25+ years in financial management, I was constantly studying strategies for peak performance. In this workshop, I share my decades of knowledge to support you in optimizing your life, professional, and business goals.

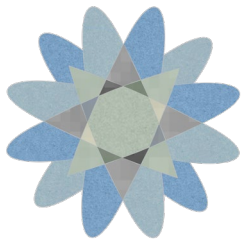
With the right **mindset** and, most critically, the right **plan**, you can achieve the highest impact goals that will enable you to accomplish your mission! Nothing moves unless you do; massive shifts can't just happen, **you** must **make them happen!**

In the words of Leonardo da Vinci, "I have been impressed with the urgency of doing. Knowing is not enough; we must apply. Being willing is not enough; we must do."

**Let's get to it!**

**Rich Bello** | CEO of Arootah





# About Arootah

**Arootah is a multifaceted coaching and wellness company working passionately with individuals and businesses who desire to unlock their full potential.**

We've identified and distilled proven behaviors at the intersection of finance, technology, and wellness. Our clients are empowered to raise their standards, overcome their challenges, and, most importantly, achieve results.

You can plan for success and take control of your outcomes. We'll be there as you accelerate into the best version of yourself.

Leadership • Inspiration • Clarity • Strategy • Accountability • Growth • Results





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# THE AROOTAH SUCCESS FORMULA

Formula: Process for Achievement

**PROCESS = RESULTS**





# Success Formula → *MVP Workshop Success Formula*

## 3 STAGES:

## MVP STEPS:

### MISSION

- 1. Area/Category
- 2. Prioritization

### GOALS

- 3. Measurement
- 4. Goal Statement
- 5. Purpose Statement

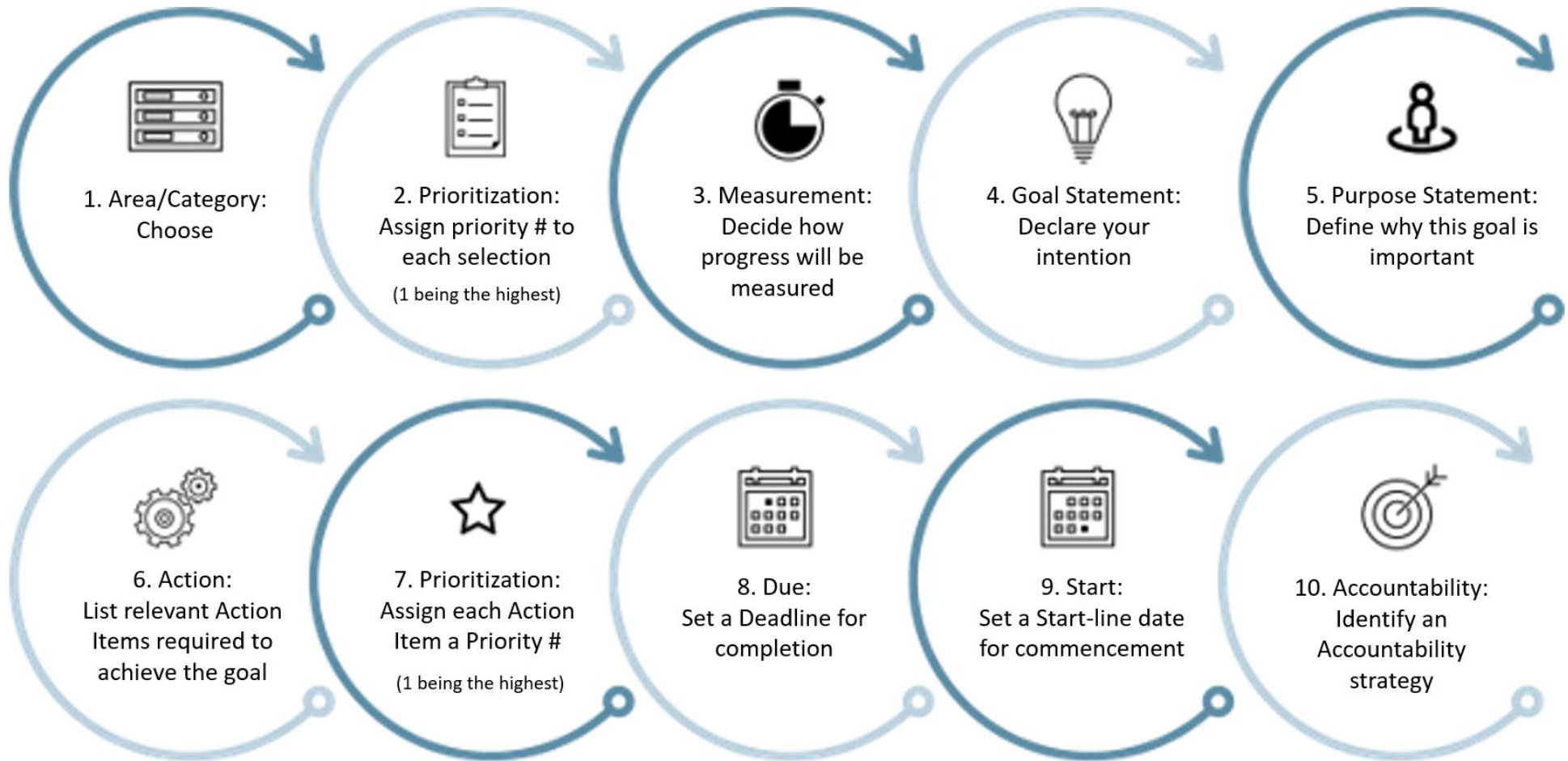
### PLANS

- 6. Actions
- 7. Prioritization
- 8. Due
- 9. Start
- 10. Accountability

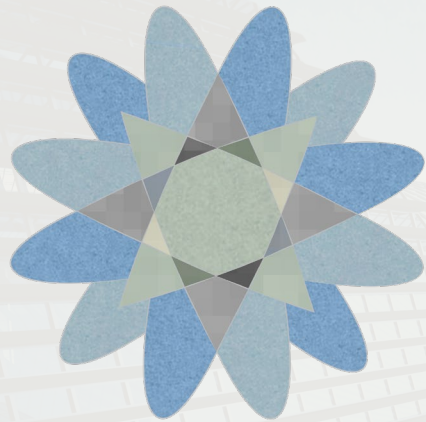




# MVP Workshop Success Formula Instructions





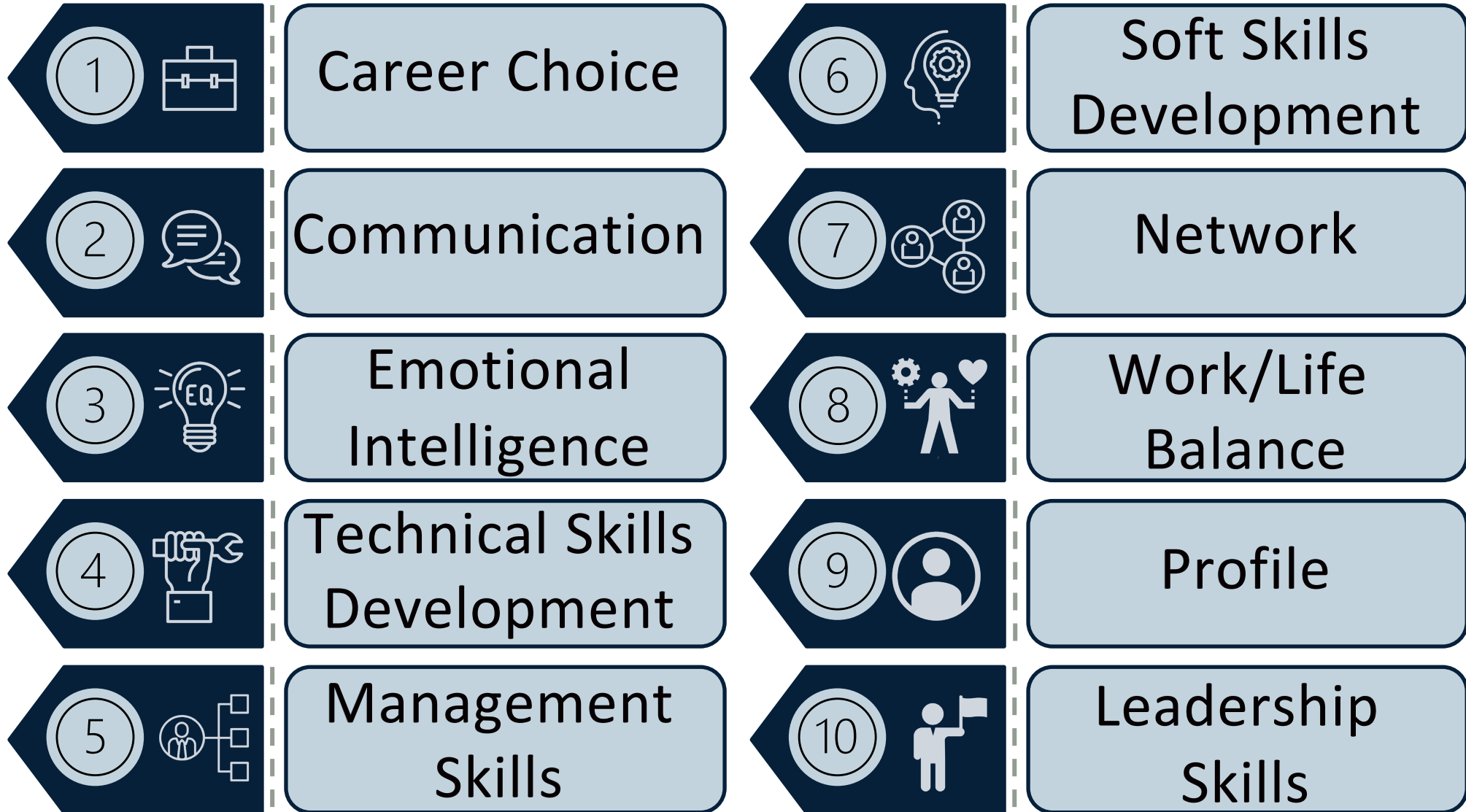


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# Areas / Categories of the Professional Domain



# Professional Areas





# Professional Areas Descriptions

AREAS	DESCRIPTION
<b>Career Choice</b>	The path in which a professional chooses to spend their time. Ideally, your career choice enables you to grow, develop, and engage in activities that increase life fulfillment.
<b>Communication</b>	The process of sharing information interpersonally. This includes written, verbal, and nonverbal. Communication can directly impact performance and success outcomes.
<b>Emotional Intelligence</b>	The ability to decipher one's own emotions and those of others. In the workplace, emotional intelligence enables professionals to work cohesively and better accomplish goals.
<b>Technical Skills Development</b>	The skills required to perform job-related tasks. Developing these skills improves productivity, performance, and can even give an individual a competitive edge.
<b>Management Skills</b>	The skills necessary to effectively manage the operations of other people. This includes technical skills, communication, project planning, decision making, and delegation.
<b>Soft Skills Development</b>	The set of skills that can impact the way a person engages with others and their work. Development in this realm encompasses optimizing personality, interpersonal skills, and other core skills such as time management and teamwork.
<b>Network</b>	The web of interpersonal connections in which an individual can draw upon for professional advantage. Networking is one of the most critical resources for career success.
<b>Work/Life Balance</b>	The equilibrium between career and personal life. Achieving this state requires an individual to prioritize work and life responsibilities equally or in a favorable manner.
<b>Profile</b>	The cumulation of how an individual is perceived in the workplace. A professional identity is created based on their online presence, grooming, thought leadership, and more.
<b>Leadership Skills</b>	The skills pertaining to a person's ability to lead and influence others. This unique set of skills can be developed for more effective and inspirational leadership.

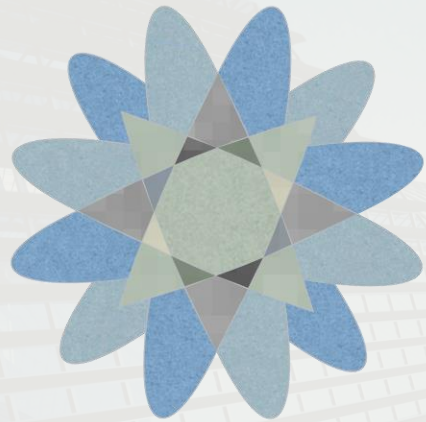


# Professional Categories

Career Choice	Communication	Emotional Intelligence	Technical Skills Development	Management Skills
Career Planning	Active Listening	Self-Awareness	Career Specific	Plans
Career Mission Statement	Verbal	Empathy	Career Specific	Schedule
Identify Your Passion	Body Language	Emotional Regulation	Career Specific	Execution
Second Career	Giving/Accepting Feedback	Positivity	Career Specific	Measurement
Compensation Negotiations	Storytelling	Adaptability	Career Specific	Training
Understanding Your Worth	Public Speaking	Organizational Awareness	Career Specific	Resource Management
Dream Career	Internal/External	Conscientiousness	Career Specific	Project Management
Interview Skills	Facilitating	Assertiveness	Career Specific	Process Management
Promotions	Persuasion	Motivation	Career Specific	Delegation Skills
Career Path/Pivot	Written	Resiliency	Career Specific	Risk Management
Soft Skills Development	Network	Work/Life Balance	Profile	Leadership Skills
Organizational Skills	Contact Management	State Management	Online Presence	Mission
Work Ethic	Industry Events	Boundaries	Resume	Goals
Stress Response	LinkedIn	Environment	Portfolio	Prioritization
Discipline	Trade Shows	Productivity	Website	Accountability Strategies
Time Management	Professional Organizations	Habits	Thought Leadership	Decision Making
Focus	Alumni Networks	Autonomy	Wardrobe	Learning From Success
Resourcefulness	Networking Events	Workload Management	Grooming	Team Building
Perseverance	Maintain Existing Relationships	Organize Personal Time	Public Relations	Mentoring
Teamwork	Volunteer	Vacations	Social Media	Culture
Energy	Serve On Boards	Disconnecting Strategy	Blog	Influence







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# Mission MVP Steps 1 & 2



# EXAMPLE: SELECT YOUR AREAS / CATEGORIES

## AREAS:

1. Career Choice
2. Career Choice
3. Communication
4. Communication
5. Emotional Intelligence
6. Emotional Intelligence
7. Technical Skills Development
8. Technical Skills Development
9. Management Skills
10. Management Skills
11. Soft Skills Development
12. Soft Skills Development
13. Network
14. Network
15. Work/Life Balance
16. Work/Life Balance
17. Profile
18. Profile
19. Leadership Skills
20. Leadership Skills

## STEP 1:

## CATEGORIES:

1. Career Planning
2. Promotions
3. Public Speaking
4. Written
5. Motivation
6. Emotional Regulation
7. Sales
8. HubSpot
9. Project Management
10. Delegation skills
11. Time Management
12. Stress Response
13. Industry Events
14. Volunteer
15. Habits
16. Vacations
17. Website
18. Social Media
19. Goals
20. Decision Making





# WORKSHOP: SELECT YOUR AREAS / CATEGORIES

## AREAS:

### STEP 1:

## CATEGORIES:

1. \_\_\_\_\_
2. \_\_\_\_\_
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# EXAMPLE: PRIORITIZE YOUR AREAS / CATEGORIES

## AREAS:

1. Career Choice
2. Career Choice
3. Communication
4. Communication
5. Emotional Intelligence
6. Emotional Intelligence
7. Technical Skills Development
8. Technical Skills Development
9. Management Skills
10. Management Skills
11. Soft Skills Development
12. Soft Skills Development
13. Network
14. Network
15. Work/Life Balance
16. Work/Life Balance
17. Profile
18. Profile
19. Leadership Skills
20. Leadership Skills

## CATEGORIES:

1. Career Planning
2. Promotions
3. Public Speaking
4. Written
5. Motivation
6. Emotional Regulation
7. Sales
8. HubSpot
9. Project Management
10. Delegation Skills
11. Time Management
12. Stress Response
13. Industry Events
14. Volunteer
15. Habits
16. Vacations
17. Website
18. Social Media
19. Goals
20. Decision Making

**STEP 2:**

## PRIORITY:

1  
9  
10  
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2  
6

## LOCK:





# WORKSHOP: PRIORITIZE YOUR AREAS / CATEGORIES

AREAS:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
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- 19. \_\_\_\_\_
- 20. \_\_\_\_\_

CATEGORIES:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
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STEP 2:

PRIORITY:

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LOCK:

# EXAMPLE: MEASUREMENT

## AREAS:

1. Career Choice
2. Leadership Skills
3. Management Skills
4. Management Skills
5. Soft Skills Development
6. Leadership Skills
7. Technical Skills Development
8. Emotional Intelligence
9. Career Choice
10. Communication
11. Technical Skills Development
12. Soft Skills Development
13. Network
14. Network
15. Work/Life Balance
16. Work/Life Balance
17. Profile
18. Profile
19. Communication
20. Emotional Intelligence

## CATEGORIES:

1. Career Planning
2. Goals
3. Project Management
4. Delegation Skills
5. Time Management
6. Decision Making
7. Sales
8. Emotional Regulation
9. Promotions
10. Public Speaking
11. HubSpot
12. Stress Response
13. Volunteer
14. Industry Events
15. Habits
16. Vacations
17. Website
18. Social Media
19. Written
20. Motivation

## STEP 3:

## MEASUREMENT: (UNIT / FREQUENCY)

1. Sessions/Year
2. Actions/Month
3. Projects Managed/Year
4. Tasks/Month
5. Appointments/Day
6. Decisions/Month
7. Courses/Month
8. Minutes/Night
9. Promotion/Months
10. Speeches/Month
11. Webinars/Month
12. Activities/Month
13. Hours/Quarter
14. Contacts/Month
15. Habits/Week
16. Days/Year
17. Pages/Month
18. Followers/Month
19. Blogs/Month
20. Quotes/Morning



# WORKSHOP: MEASUREMENT

**AREAS:**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
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**CATEGORIES:**

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- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
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- 6. \_\_\_\_\_
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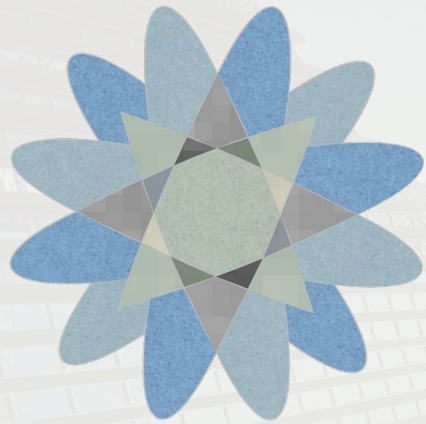
**STEP 3:**

**MEASUREMENT: (UNIT / FREQUENCY)**

- 1. \_\_\_\_\_
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# Goals & Plans

## MVP Steps 3 – 10



# Example: Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
Career Choice Career Planning	1	Sessions/Year	I will hire a career coach with at least 10 years experience and schedule 52 weekly sessions.	The clarity, strategies, and accountability provided by a coach will keep me on track towards achieving my dream career goals while ending the despair of an unfulfilling career.

## PLAN

6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
<b>GOAL:</b> I will hire a career coach with at least 10 years experience and schedule 52 weekly sessions.	1	1/28/23	1/28/22	Executive Coach
Action: Attend professional workshop on goal setting	1	1/28/22	1/28/22	Willpower
Action: Sign up with a career coach	2	1/31/22	1/29/22	Executive Coach
Action: Read the Success Formula book	4			
Action: Brainstorm what my dream career would like	3			
Action: Think of the areas and categories that are most important for my career	5			
Action: Define the roles I want to play	10			
Action: Brainstorm a list of values I want to live by professionally	8			
Action: Create a code of conduct based on my values	6			
Action: Craft a vision statement	7			
Action: Define my career's purpose	9			



# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	1			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
1				

Action:

Action:

Action:

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Action:

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Action:





# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	2			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	2			

Action:

Action:

Action:

Action:

Action:

Action:

Action:

Action:

Action:

Action:



# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	3			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
3				

Action:

Action:

Action:

Action:

Action:

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Action:

# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	4			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	5			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	5			

Action:

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Action:



# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	6			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL: 6				

Action:

Action:

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Action:

# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	7			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL: 7				

Action:

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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	8			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	8			

Action:

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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	9			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL: 9				

Action:

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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	10			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
10				
Action:				
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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	11			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	11			

Action:

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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	12			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	12			
Action:				
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Action:				
Action:				
Action:				

# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	13			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	13			

Action:

Action:

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Action:

Action:





# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	14			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
14				
Action:				
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Action:				

# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	15			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	15			
Action:				
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Action:				

# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	16			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	16			

Action:

Action:

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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	17			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
17				
Action:				
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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	18			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
18				

Action:

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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	19			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:				
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# Goal Action Plan

MISSION		GOAL		
1. AREA & CATEGORY	2. PRIORITY	3. MEASUREMENT (Units/Frequency)	4. GOAL	5. PURPOSE (Rewards/Consequences)
	20			

PLAN				
6. ACTIONS TO ACHIEVE GOAL	7. PRIORITY	8. DUE	9. START	10. ACCOUNTABILITY
GOAL:	20			

Action:

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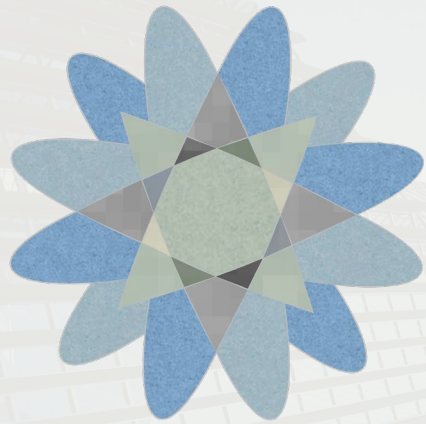
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# Master Plan Example





# Example: Master Plan

<b>PRIORITY #</b> 1	<b>AREA:</b> Career Choice <b>CATEGORY:</b> Career Planning			<b>GOAL:</b> I will hire a career coach with at least 10 years experience and schedule 52 weekly sessions.
<b>START:</b> 1/28/22	<b>DUE:</b> 1/28/23	<b>MEASUREMENT:</b> Sessions/Year	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> The clarity, strategies, and accountability provided by a coach will keep me on track towards achieving my dream career goals while ending the despair of an unfulfilling career.
<b>ACTION ITEM 1:</b> Attend professional workshop on goal setting				<b>ACTION ITEM 2:</b> Sign up with a career coach
<b>PRIORITY #</b> 2	<b>AREA:</b> Leadership Skills <b>CATEGORY:</b> Goals			<b>GOAL:</b> Set the top 5 SMARTER goals for my career and complete the top two action items for each of them over the next two months.
<b>START:</b> 1/30/22	<b>DUE:</b> 5/30/22	<b>MEASUREMENT:</b> Actions/Month	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> Having clearly defined goals and plans to achieve them will ensure that I have a successful career that gives me ultimate fulfilment.
<b>ACTION ITEM 1:</b> Sign up for a career coach				<b>ACTION ITEM 2:</b> Create a prioritized list of everything I want to accomplish in my career
<b>PRIORITY #</b> 3	<b>AREA:</b> Management Skills <b>CATEGORY:</b> Project Management			<b>GOAL:</b> Volunteer to manage the firm's next 3 highest priority projects this year
<b>START:</b> 1/30/22	<b>DUE:</b> 12/13/22	<b>MEASUREMENT:</b> Projects Managed/Year	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> The best way to learn is by doing. Taking on projects to lead will help our firm towards its mission. I will also learn and grow a great deal in the process. A very high leverage goal!
<b>ACTION ITEM 1:</b> Schedule a meeting with The Results Committee				<b>ACTION ITEM 2:</b> Pick out the next 3 highest priorities projects of the firm
<b>PRIORITY #</b> 4	<b>AREA:</b> Management Skills <b>CATEGORY:</b> Delegation skills			<b>GOAL:</b> Delegate out 5 different tasks that I perform at work to Nova
<b>START:</b> 1/30/22	<b>DUE:</b> 4/30/22	<b>MEASUREMENT:</b> Tasks/Month	<b>ACCOUNTABILITY:</b> Advisor	<b>PURPOSE:</b> Nova is amazing and always looking to help! By freeing up my time on these tasks, I can focus on higher priority items.
<b>ACTION ITEM 1:</b> Create a prioritized list of all the tasks that I can delegate out				<b>ACTION ITEM 2:</b> Set up a meeting with Nova so I can show her step by step what needs to be done
<b>PRIORITY #</b> 5	<b>AREA:</b> Soft Skills Development <b>CATEGORY:</b> Time management			<b>GOAL:</b> Be on time or early for 90% of my appointments
<b>START:</b> 1/30/22	<b>DUE:</b> 3/01/22	<b>MEASUREMENT:</b> Appointments/Day	<b>ACCOUNTABILITY:</b> Advisor	<b>PURPOSE:</b> Being on time isn't only good manners and professional but will help me become more disciplined and have much better command of my schedule.
<b>ACTION ITEM 1:</b> Log all of my appointments and meetings onto my Outlook calendar				<b>ACTION ITEM 2:</b> Set up a system of alarms in my phone to remind me when it's time to leave for appointments



# Example: Master Plan

<b>PRIORITY #</b> 6	<b>AREA:</b> Leadership Skills <b>CATEGORY:</b> Decision making			<b>GOAL:</b> I want to become a better decision maker by eliminating 5 meaningless decisions I have to make on a daily basis this month.
<b>START:</b> 1/31/22	<b>DUE:</b> 6/12/22	<b>MEASUREMENT:</b> Decisions/Month	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> Decluttering my brain of insignificant decisions will help prevent decision fatigue and ultimately burnout.
<b>ACTION ITEM 1:</b> Create a list of simple things I can systemize such as what I'm going to eat day				<b>ACTION ITEM 2:</b> Commit to my coach that I will stick to the plan
<b>PRIORITY #</b> 7	<b>AREA:</b> Technical Skills Development <b>CATEGORY:</b> Sales			<b>GOAL:</b> Sign up for and attend 3 sales courses over the next 12 months
<b>START:</b> 1/30/22	<b>DUE:</b> 12/30/22	<b>MEASUREMENT:</b> Courses/Month	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> Being a world class salesman will help grow our client base exponentially. This will mean more money for our firm and for me and my family!
<b>ACTION ITEM 1:</b> Research the best sales courses in the tri state area				<b>ACTION ITEM 2:</b> Sign up for them and schedule in
<b>PRIORITY #</b> 8	<b>AREA:</b> Emotional Intelligence <b>CATEGORY:</b> Emotional Regulation			<b>GOAL:</b> I am going to write in my journal 15 minutes every night and include what I'm grateful for and what is causing my anxiety.
<b>START:</b> 1/30/22	<b>DUE:</b> 3/13/22	<b>MEASUREMENT:</b> Minutes/Night	<b>ACCOUNTABILITY:</b> Life Coach	<b>PURPOSE:</b> Writing in my journal every night will help me declutter my brain and help eliminate the negativity that sometimes nags at me
<b>ACTION ITEM 1:</b> Buy an incredible leather bound journal				<b>ACTION ITEM 2:</b> Buy an amazing pen that I will actually enjoy writing with
<b>PRIORITY #</b> 9	<b>AREA:</b> Career Choice <b>CATEGORY:</b> Promotions			<b>GOAL:</b> To receive a promotion within the next 6 months to the role I've always dreamed of
<b>START:</b> 3/30/22	<b>DUE:</b> 10/30/22	<b>MEASUREMENT:</b> Promotion/Months	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> Getting this promotion will bring me so much fulfillment in my career. It will also give me a better salary and status within the firm.
<b>ACTION ITEM 1:</b> Discuss strategy with my coach				<b>ACTION ITEM 2:</b> Schedule meeting with my boss to discuss
<b>PRIORITY #</b> 10	<b>AREA:</b> Communication <b>CATEGORY:</b> Public speaking			<b>GOAL:</b> Sign up for a public speaking class and give 2 speeches a month there
<b>START :</b> 01/30/22	<b>DUE :</b> 03/01/22	<b>MEASUREMENT :</b> Speeches/Month	<b>ACCOUNTABILITY:</b> Advisor	<b>PURPOSE:</b> Being a masterful public speaker will greatly improve my confidence and also help me move forward in my career.
<b>ACTION ITEM 1:</b> Research the closest toast masters to my house				<b>ACTION ITEM 2:</b> Sign up for the next meeting



# Example: Master Plan

<b>PRIORITY #</b> <b>11</b>	<b>AREA:</b> Technical Skills Development <b>CATEGORY:</b> HubSpot			<b>GOAL:</b> Sign up for and attend 2 different HubSpot webinars over the next 3 months
<b>START:</b> 1/31/22	<b>DUE :</b> 4/30/22	<b>MEASUREMENT:</b> Webinars/Month	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> HubSpot is such a dynamic tool that will complement our sales effort in a big way. Learning its most important features will help make our lives easier and increase our revenue in the process.
<b>ACTION ITEM 1:</b> Reach out to HubSpot about which webinars they host				<b>ACTION ITEM 2:</b> Sign up for them and schedule in
<b>PRIORITY #</b> <b>12</b>	<b>AREA:</b> Soft Skills Development <b>CATEGORY:</b> Stress Response			<b>GOAL:</b> Add 3 healthy activities that I can incorporate into my workday to help me better deal with stress.
<b>START:</b> 1/30/22	<b>DUE:</b> 5/30/22	<b>MEASUREMENT:</b> Activities/Month	<b>ACCOUNTABILITY:</b> Executive Coach	<b>PURPOSE:</b> Having a healthy way to deal with and manage stress will do wonders for my overall health and well-being.
<b>ACTION ITEM 1:</b> Create a list of healthy activities or ways to reduce stress				<b>ACTION ITEM 2:</b> Create a plan of how to incorporate the top 3 into my everyday routine
<b>PRIORITY #</b> <b>13</b>	<b>AREA:</b> Network <b>CATEGORY:</b> Volunteer			<b>GOAL:</b> I will select the charitable organization that most closely aligns with my values and supports the same causes I do. I will volunteer 25 hours a quarter.
<b>START:</b> 1/30/22	<b>DUE:</b> 2/13/22	<b>MEASUREMENT:</b> Hours/Quarter	<b>ACCOUNTABILITY:</b> Team Coach	<b>PURPOSE:</b> Being able to volunteer my time and give back to worthy causes will not only support them and help others but will also help me grow as a person in the process.
<b>ACTION ITEM 1:</b> Set up Decision Matrix with top 10 criteria in which to select a charitable organization				<b>ACTION ITEM 2:</b> Research charities that support the same causes that I do
<b>PRIORITY #</b> <b>14</b>	<b>AREA:</b> Network <b>CATEGORY:</b> Industry events			<b>GOAL:</b> I will go to 3 industry events over the next 6 months and make 10 new meaningful contacts.
<b>START:</b> 1/30/22	<b>DUE:</b> 7/30/22	<b>MEASUREMENT:</b> Contacts/Month	<b>ACCOUNTABILITY:</b> Team Coach	<b>PURPOSE:</b> Growing my network will open up a tremendous amount of opportunities in both my personal and professional life
<b>ACTION ITEM 1:</b> Schedule in the next 3 industry events				<b>ACTION ITEM 2:</b> Research a good system to manage contacts
<b>PRIORITY #</b> <b>15</b>	<b>AREA:</b> Work/Life Balance <b>CATEGORY:</b> Habits			<b>GOAL:</b> Instill a positive new habit into my life every week for the next 10 weeks
<b>START :</b> 1/30/22	<b>DUE :</b> 4/10/22	<b>MEASUREMENT :</b> Habits/Week	<b>ACCOUNTABILITY:</b> Life Coach	<b>PURPOSE:</b> Our lives are a collection of our habits. Having a system in place for instilling new good habits on a regular basis will dramatically increase the quality of my life and career.
<b>ACTION ITEM 1:</b> Create a prioritized list of all the positive habits I want to instill in my life and career				<b>ACTION ITEM 2:</b> Sign up for the Habit Tracker

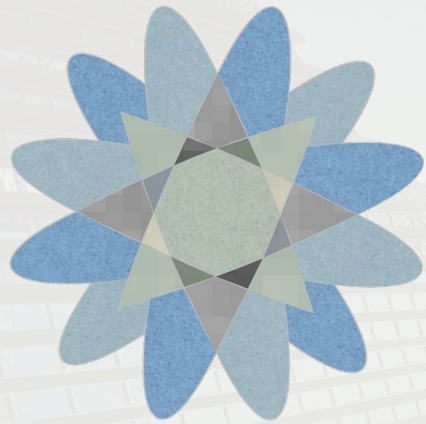


# Example: Master Plan

<b>PRIORITY #</b> 16	<b>AREA:</b> Work/Life Balance <b>CATEGORY:</b> Vacations			<b>GOAL:</b> To use up 10 of my 15 vacation days before the year is over
<b>START:</b> 1/31/22	<b>DUE :</b> 12/12/22	<b>MEASUREMENT:</b> Days/Year	<b>ACCOUNTABILITY:</b> Life Coach	<b>PURPOSE:</b> Taking these vacation days will help prevent me from getting burned out and also will allow me to spend very high quality time with my family.
<b>ACTION ITEM 1:</b> Coordinate family's schedules				<b>ACTION ITEM 2:</b> Make a prioritized list of trips we want to take
<b>PRIORITY #</b> 17	<b>AREA:</b> Profile <b>CATEGORY:</b> Website			<b>GOAL:</b> To have an outstanding 5-page website built that displays my expertise and who I am as a person
<b>START:</b> 1/30/22	<b>DUE:</b> 5/30/22	<b>MEASUREMENT:</b> Pages/Month	<b>ACCOUNTABILITY:</b> Software/App	<b>PURPOSE:</b> Having an amazing site built will really help boost my profile and my presence. This will also help me generate leads for my consulting business.
<b>ACTION ITEM 1:</b> Reach out to friend who builds websites				<b>ACTION ITEM 2:</b> Research sites that I like as inspiration
<b>PRIORITY #</b> 18	<b>AREA:</b> Profile <b>CATEGORY:</b> Social Media			<b>GOAL:</b> My goal is to gain 1,000 followers over the next 3 months for my personal Instagram account
<b>START:</b> 01/30/22	<b>DUE:</b> 04/01/22	<b>MEASUREMENT:</b> Followers/Month	<b>ACCOUNTABILITY:</b> Friends	<b>PURPOSE:</b> Growing my following will help create new business opportunities and also increase my platform in which to display my expertise on.
<b>ACTION ITEM 1:</b> Research top 10 ways to increase your IG following				<b>ACTION ITEM 2:</b> Schedule in the top 3
<b>PRIORITY #</b> 19	<b>AREA:</b> Communication <b>CATEGORY:</b> Written			<b>GOAL:</b> Write two blogs a month on topics I enjoy so that I can improve my skills as a writer.
<b>START:</b> 1/30/22	<b>DUE:</b> 11/30/22	<b>MEASUREMENT:</b> Blogs/Month	<b>ACCOUNTABILITY:</b> Willpower	<b>PURPOSE:</b> Writing is a very important skill to master and something I've struggled with. Improving in this area will greatly improve the quality of my work.
<b>ACTION ITEM 1:</b> Brainstorm a list of topics I would enjoy writing about				<b>ACTION ITEM 2:</b> Schedule time in every Saturday morning to sit and write for an hour
<b>PRIORITY #</b> 20	<b>AREA:</b> Emotional Intelligence <b>CATEGORY:</b> Motivation			<b>GOAL:</b> Circulate a new motivational quote every morning so we can all start our days off on the right foot
<b>START :</b> 1/30/22	<b>DUE :</b> 12/12/22	<b>MEASUREMENT :</b> Quotes/Morning	<b>ACCOUNTABILITY:</b> Life Coach	<b>PURPOSE:</b> Motivating the team every morning so we can go after our collective mission with all of our might will be fantastic for the firm!
<b>ACTION ITEM 1:</b> Create list of 365 motivational quotes				<b>ACTION ITEM 2:</b> Schedule Outlook to send out emails every morning







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# Your Master Plan



# Master Plan

PRIORITY # 1	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 2	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 3	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 4	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 5	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:



# Master Plan

PRIORITY # 6	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 7	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 8	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 9	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 10	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:



# Master Plan

PRIORITY # 11	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 12	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 13	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 14	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 15	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:





# Master Plan

PRIORITY # 16	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

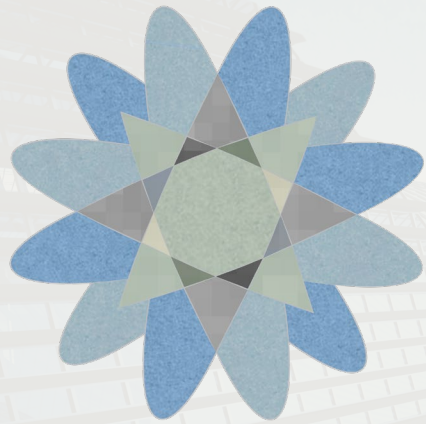
PRIORITY # 17	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 18	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 19	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:

PRIORITY # 20	AREA: CATEGORY:			GOAL:
START:	DUE:	MEASUREMENT:	ACCOUNTABILITY:	PURPOSE:
ACTION ITEM 1:				ACTION ITEM 2:





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# Arootah Resources





# Executive Coaching

- ❑ Hone the skills of expert decision-making, calm crisis management, and being a master delegator
- ❑ Optimize your time and everything in your business from the top down
- ❑ Sign up for Arootah Executive Coaching at <https://arootah.com/executive-coaching/>

Professional Coaching	Executive Coaching	Professional Team Coaching	Executive Team Coaching
<ul style="list-style-type: none"> <li>Fitting for VP- Level leadership and below</li> <li>Constructive accountability</li> <li>Rapid professional growth</li> </ul>	<ul style="list-style-type: none"> <li>For C-Suite level executives</li> <li>Effective milestone attainment</li> <li>Regular progress check-ins</li> </ul>	<ul style="list-style-type: none"> <li>Achieve and succeed with fellow leaders on your team</li> <li>Intense, weekly planning</li> <li>Practice leadership agility</li> </ul>	<ul style="list-style-type: none"> <li>Mastermind dynamic</li> <li>Powerful strategy and guidance</li> <li>Systematic goal achievement</li> </ul>

# Career Coaching

- ❑ Receive powerful leadership strategies to optimize all aspects of your work-life balance
- ❑ Land your dream position or create one for yourself
- ❑ Take the complexities of high-pressure leadership and formulate tangible action plans to tackle obstacles
- ❑ Sign up for Arootah Career Coaching at <https://arootah.com/career-coaching/>

Foundational Career	Advanced Career
<ul style="list-style-type: none"> <li>Execute high-growth actions</li> <li>Activate enduring energy, admirable discipline, and focus</li> <li>Learn powerful decisions making tools</li> </ul>	<ul style="list-style-type: none"> <li>Maximize ROI everywhere possible</li> <li>Accomplish goals you once considered unattainable</li> <li>Cultivate a company culture that breeds loyalty and ensures growth</li> </ul>



# Remote Work Coaching

- ❑ Lead a thriving team when working from anywhere.
- ❑ Stay focused, competitive and scale up remote performance.
- ❑ Hire the world's top talent and become a global powerhouse.
- ❑ Sign up for Arootah Remote Work Coaching at <https://arootah.com/remote-work-leadership/>

Procedural Streamlining	Culture and Team Building
<ul style="list-style-type: none"><li>• Evaluate your company's remote operations for efficiency and effectiveness.</li><li>• Renovate remote work operations with a policy overhaul.</li><li>• Join forces with expert consultants to establish and implement new policies.</li></ul>	<ul style="list-style-type: none"><li>• Minimize isolation, boost productivity, and enhance focus in our moderated virtual workspaces.</li><li>• Prioritize the health and wellbeing of your entire team.</li><li>• Build better team connections with professional development workshops, team-building experiences, and virtual social events.</li></ul>

# Speaking Engagements

- ❑ Our webinars, seminars, and workshops are packed with practical strategies to help you execute actions that get results!
- ❑ Get our founder Rich Bello to speak or present your next event. Learn more at <https://arootah.com/speakingengagements.>

## Corporate and executive speaking topics:

Success Formula	Leadership Development	Energy Optimization	Remote Work Leadership	Goal Setting
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# Life Coaching

- ☐ Get the support to put these incredible goals into action.
- ☐ Overcome barriers and deliver the results you're striving for.
- ☐ Sign up for Arootah Life Coaching at <https://arootah.com/life-coaching/>

Fundamental Coaching	Elite Coaching	Master Coaching	Group Coaching
<ul style="list-style-type: none"><li>• Build structure into your life by mapping it out</li><li>• Clarify big-picture goals</li><li>• Devise feasible action plans to execute your ambitious goals</li></ul>	<ul style="list-style-type: none"><li>• Optimize your time, learn to prioritize what is important</li><li>• Overcome your toughest challenges to date</li><li>• Find fulfilment beyond your career</li></ul>	<ul style="list-style-type: none"><li>• Enrich your decision-making abilities</li><li>• Tackle ventures with confidence</li><li>• Grow your decision-making abilities</li></ul>	<ul style="list-style-type: none"><li>• Workshop your big plans and goals with other ambitious people</li><li>• Gain a different perspective by connecting with others</li><li>• Track progress, maximize outcomes, and productivity</li></ul>

# Health Coaching

- ☐ Construct a steady path to a fulfilling life with a strong foundation of healthy habits.
- ☐ Create wellness strategies that align with your goals and work for your lifestyle.
- ☐ Sign up for Arootah Health Coaching at <https://arootah.com/personal/health-coaching/>

Fundamental Health Coaching	Specialty Health Coaching	Fundamental Health Group Coaching
<ul style="list-style-type: none"><li>• Nourish a healthy mind, body, and spirit</li><li>• Eradicate bad habits</li><li>• Unlock potential from the inside out</li></ul>	<ul style="list-style-type: none"><li>• Learn what works for your body</li><li>• Work with a specialist in an aspect of health that interests you</li><li>• Reap the rewards of investing in yourself</li></ul>	<ul style="list-style-type: none"><li>• Strengthen whole-body health</li><li>• Build lasting energy, fuel a fulfilling life</li><li>• Maintain accountability with support from your group members</li></ul>





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**The EnRichment Show** by Rich Bello

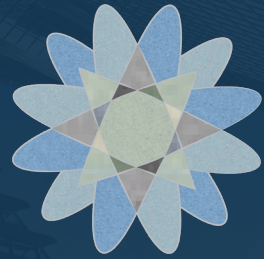
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# AROOTAH

## Thank You

We hope you gained significant value by completing this workbook!

Please give us your honest feedback in this survey [here.](#)

Now that you have your goals and plans....it's time to achieve them!

Contact us for the strategy and accountability you need to put this plan into action.

