

Ep #86: Review Your Month in 5 Simple Steps



Full Episode Transcript

With Your Host

Dr. Una

The EntreMD Podcast

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Hi docs, welcome to *The EntreMD Podcast*, where it's all about helping amazing physicians just like you embrace entrepreneurship so you can have the freedom to live life and practice medicine on your terms. I'm your host, Dr. Una.

Well, hello, hello. And welcome back to another episode of *The EntreMD Podcast*. And as always, I am super-excited that you're here.

I want to start this off by reading a review from one of our listeners, Dr Carolyn Brown. And she says, "Love this podcast," and leaves us five stars, and says, "I'm not a podcast person at all, but I love Dr. Una's take on everything and I can't wait to listen to her podcast. As physicians, we need to embrace our leadership skills. We have such a great skillset and Dr. Una reminds you of this and gives you strategies to apply to your daily life. Every physician should be listening to this."

What? Thank you. What an amazing review. I'm so happy you're getting so much out of this podcast and I'm so happy that you're embracing it all. And I'm going to tell my listeners what you said. Every physician should be listening to this.

So, what I would love for you to do today is to take a moment. If you haven't already left us a review, please leave us a review. It truly helps. And I also want you to share this with the doctors in your life.

This could be the doctors you work with. This could be on social media. This could be in a Facebook group that you're a part of. This could be your organization. If you know a group of doctors and you're like, "They absolutely need to hear all this," share it with them. Listen to what Dr. Carolyn Brown said.

Alrighty, well let's get into the episode for today. Now, today is February 1st, and the truth of the matter is, I think we're kind of over the euphoria of we're in a brand-new year, right?

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Because usually, what happens in January, everybody is so optimistic, like really, really optimistic. And I'm an optimistic person, so that doesn't mean there's a problem with it, it's just that the optimism is a little misguided, if you will. And the optimism just comes from, "2020 was such a bad year. 2021 is going to be a good year." Or, "2015 was a bad year, oh my goodness, 2016 is going to be my best year yet."

But a lot of times, after January is done, we find out that it really is more of the same. Except we take control of it. But on its own, it's not going to get better.

And I had those years where year to year, I was just optimistic but I didn't have any strategies in place, I didn't have anything I was doing to make the year better than the year before. And a few years ago, I discovered a principle which makes it possible for you to have such dramatic results in a 12-month period.

And that comes from taking stock. So, we are done with the first month of the year. Have you hit a 12th of your goals? Did you make progress? Are you on your way? Now, if you don't measure, you won't know. If you don't think about it, if you don't stop to evaluate, you won't know.

And so, today, what we're going to be doing is we're going to be looking at how to audit your month. Now, if you're like me, you may think of that and think about all these graphs and pie charts and stuff like this and you're like, "I just don't want to do this." This is not going to be like that at all. This is a quick and easy method. But if you're stalling, if you're procrastinating, if you're not doing what you need to do, it will call you out. If you're on track, you'll know.

So, this is going to be simple. The problem with simple things is that it's simple to do, simple not to do. So, I want you to make a commitment right off the top that you're going to do it.

I read a book by Michael Hyatt, Your Best Year Ever. And in that book, he had a friend who made a statement I'll never forget. And he said, "The

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reason why a lot of people don't accomplish their goals is because they don't have a relationship with their goals." I'm like, what?

And the concept is really, you write the goals once, and then you're done. And the next time you write goals is December of the following year, and that's it. And if you will build a relationship with your goals where they're not at the back of your mind or completely forgotten but they're at the forefront, it becomes so much easier to do the things you set out to do.

And I started learning to build a relationship with my goals. And in the EntreMD Business School, we had a vision retreat where we set our goals, we did all of that, and one of the things we did in that exercise was coming up with a meeting schedule with ourselves, like I meet to review my goals and all these things.

And what it does, it just sets you up that you're kind of having that December, "I have to plan my life kind of moment," all year long. So, imagine what it does to your productivity. Imagine what it does to your ability to dream big. Imagine what it does to all of that. It's great.

So, we're going to be looking at that today. And it's going to be a simple five-step process, the things that you need to do. So, yes this is February 1st, but this is what you would do March 1st or April 1st or December 1st, or anytime you find that it's time to review my goals again. So, it's not tied to a date, per se, but I want you to really take this with you and plan to do it. It will change the kind of results that you get.

Alright, so, these are the five steps. This is what you do, a simple way to review your month, a simple way to audit your month, a simple way to audit the last 30 days, okay.

The first thing you do is you review your annual goals. Because that's kind of like going to the mall and you go to the directory and you see Saks Fifth Avenue is over here. You kind of want to have that view, like that's where it is and this is where I am and stuff like that.

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So, you want to review your annual goals. Now, if you don't have them, you should go create them, okay. You want to have goals. You don't want to live your life or whole year and not have a specific place you're going to. You don't want to do that.

So, you want to have your goals written out. Written out, not in your mind. And if you haven't done them, go do them. If you did them but, I mean, January 1st was the last time you looked at them, go pull them out. But you want to review those.

Now, if you're here and you're like, "I've never really set goals before," there's no problem with that. This is a brand-new day and you can start from today. And we have a course that is called Five Steps to Your Best Year actually and it's part of the EntreMD On Demand subscription program. And you can sign up today. You get access to your first course. go for it.

And we would walk you through the nine areas of life where you need to set goals, how to set goals, how to build relationship with them, the whole nine yards, everything is there. Okay. But the first step, review your annual goals. If you don't have them, set them.

The second step is review the plans you have to achieve those goals. Because having the goals is one thing, but what are you going to do to make it your reality? So, say you said, "I'm going to have a number one podcast," or, "I'm going to have a successful podcast," so the question becomes, did you put a plan in place to make sure that you have an episode being released every week?

Did you put a plan in place to let people know about your episodes every week? Did you put a plan in place to get high-quality guests on your podcast, depending on the kind of podcast either weekly, biweekly, or once a month, you know, do you have that in place? Do you have a plan to be on other people's podcasts so people can find out that you're a podcaster?

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So, if you don't have all those plans then you have a goal, but then it's kind of more like a wish because you need to engage. You need to know, what do I need to do every day or every week or every month that makes sure that I'm headed in the direction of my most important goals.

Or you had a goal, like, "In my business for the first time we're going to hit 10 grand." Okay, and so what does that mean? Does that mean I'm going to get more clients? Does that mean I'm going to change my price? Does that mean I'm going to work on more referral sources? What is the strategy? What is the plan to get you there?

And if you don't have those plans, then this is a good time to map it out, to do some brainstorming or to do some mind-storming and say this is what I need to do if I'm going to hit that target. Okay, so step number one, review your annual goals.

Step number two, review your plans to achieve them. So, this is kind of a balcony view kind of thing, we're all the way up there.

Now, number three is a come to Jesus moment. and you're not going to lie to yourself. This is where you have to be brutally honest because if you lie to yourself, you're going to have results you won't like and the results are not going to lie.

So, you're going to have to be honest. So, step three is review your actions over the last 30 days. So, there are things you were supposed to do that would take you in the direction of your goals. You know what they are, the things you're supposed to do.

So, say you're the podcaster, you're like, "I'm going to do an episode a week. I'm going to batch them and I'm going to do an episode a week." Say you're a new coach. You're like, "I'm going to tell X number of people what I do every single week." Say you're in private practice, you said, "I'm going to cultivate this number of referral sources every week" like you had a plan. So, you're going to review your actions.

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Now, you're going to do two things. They're going to be actions you took. They're going to be actions you failed to take. So, for the actions you failed to take, you're going to acknowledge them and you're going to make a commitment to get them done.

Now, that may require some work. Some of it may be some mindset work to see why you're stalling or procrastinating on those. That may mean you need to schedule it. That may mean you need to delegate it. That may mean you need to have an accountability partner with it. But you have to do something to make it work so that over the next 30 days you execute relentlessly.

Now, there are going to be actions that you did take. And with those actions that you did take, I want you to acknowledge them and celebrate them. We don't wait until December 31st to celebrate. We start celebrating January 1st. And I want you to acknowledge, like, I did that. I was consistent with that. Why?

In this stage of reviewing, it's so easy to take off on a tangent and get sad and depressed and moody because of all the things you didn't do. But there's a balance. The chances are, there are things that you did, there are things that worked. So, you want to take note of both of them.

So, the things that you were supposed to do that you did, you're going to acknowledge and celebrate. The things you were supposed to do and you didn't, you're going to acknowledge them. You're not going to hide. You're not going to pretend. You're not going to blame anybody. You're not going to play the victim. You're going to acknowledge, "I did not do what I was supposed to do." And then, you're going to make a commitment. And if they're obstacles, you're going to work through those.

So, number one, review your annual goals. Number two, review your plans to achieve them. Number three, review your actions.

Number four, you want to decide on your monthly goals. So you're like, "Wait a minute, we already did the goals." Yes, the goals for the year. But

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for the month of February, or August, or September, whatever the month is, what portion of those goals do you want to achieve?

Is this the month where you have to do a launch? What kind of launch do you want to have? Is this the month where you go on vacation? Because you're not going on vacation every month. Where do you want to go? Is this the month where you invest in your family more than any other time? Then that's what it is. Is this the month where you finally launch your podcast or your private practice or your product line?

You take into account, what do I need to accomplish this month to make sure that I'm on track to meet my annual goals? So, it doesn't mean you're taking a 12th of all your goals, because you can have all of them, you just won't have all of them exactly the same way all the time.

Some will be busier in some aspects of your life than others, and that's just the way it is. So, decide, this month, what do I want to accomplish? What do I want to accomplish? So, you have your annual goals, but you have your monthly goals as well. So, that's number four.

And then number five is you're going to plan your actions. What do I need to do this month? Because sometimes, 12 months is like, "This is what I'm going to do this year," and it's kind of like all over the place. But, "What am I going to do this month? What am I going to accomplish this month? What do I need to do to accomplish those things this month? So, who are the people I need to meet with this month? What are the number of podcast episodes I need to do this month? What do I need to launch this month? What collaborations do I need to do this month?"

And what that does is it makes it easier when, say, if you're like me, every Sunday, I would sit to plan my week and it's not all over the place because this is what I need to accomplish this month, and now that I'm planning my week, what portion of it do I need to do in week one or week two or week three or week four?

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So, I know it might seem like, “Oh my goodness, that’s a lot.” But truthfully, it’s not. And the thing is, the more you engage this process, the more strategic your actions are, the more you’re able to control your time, the more you’re able to prioritize.

And even when you end up having seasons that are weird or days that are weird, because you’re clear on what you need to do to move forward, you still end up making a lot of progress regardless.

So, I want to challenge you. I want to challenge you to just take a moment, take a journal. If you’re someone like me who loves being outdoors, you can go outdoors and just sit, give yourself 30 minutes, an hour, an hour and a half, however long it takes, and I want you to walk through this process.

So, pull those annual goals. Review them. If you don’t have them, set them. Review your plans to achieve those things for the year. Do they match? Do they match what I’m trying to accomplish? Review your actions. And be really honest, brutally honest with yourself here, what did I do? What didn’t I do?

Because who wants to be shocked at the end of the year, like, “I didn’t do anything I set out to do.” Who wants to have that? I mean, I might as well have the come to Jesus moment with myself in February. I would prefer to do that than in December. And then, number four, decide on your monthly goal. What do you want to accomplish this month? What do you want to accomplish? And number five, plan your actions.

And if you would do this, this will be a gamechanger for you. So, I don’t know that I talked a lot about what my word or words were for this year. But what I’ve really been working on is simplify and maximize. Simplify and maximize.

And one of the ways you can simplify is by planning. The more you plan, the more you can make all the things you have to do work together for your one big purpose. You’re not like all over the place. You’re clear on what you need to do. You’re clear on the steps you need to take. So, when

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people bring shiny objects you're like, "This doesn't fit in what I'm trying to do. This doesn't fit in my strategy. This doesn't take me closer to my goals."

So, even though it's all nice and shiny, you're able to resist it better because you have a plan. You're clear on where you're going, you know what I mean? Like, if you were at the airport and you met this friend that you haven't seen since college, the last time you saw them was 15 years ago and you guys were really close then, you're like, "Oh my god I'm so excited, I get to see you, this is so amazing," you guys catch up on old times, you explore all your nostalgia and do the whole nine yards.

And you're like, "Man, I'm on my way to Chicago, where are you going?" And he's like, "Oh man, I'm just going to New Jersey, I'm going to go see family and stuff like that," what if he said, "Will you come with me? Will you come with me to New Jersey?" The chances are, you'll be like, "Nuh-uh, I'm going to Chicago."

And he's like, "But please, we get to chat the whole way there and we get to catch up on old times. It will be cool. You'll even get to see my folks," you'll be like, "Nuh-uh, I'm going to Chicago." Why would it be so easy for you to resist the temptation of going with them? It would be easy because you are clear on where you're going.

We live in a time where, oh my goodness, you're bombarded with ads. Like, it used to be the billboards, TV, all of that, but social media has taken it to a whole new level. And the scary thing about it is, you know, a lot of people are right.

So, for instance, let's say you did an online course. and somebody will come up to you and say, "The best way to get traffic and get clients for your online course is to do Facebook groups." And somebody else is going to say, "Oh no, you have to do an evergreen funnel with a webinar." And somebody else is going to say, "Oh my goodness, Facebook ads." Someone else is going to say, "It's Challenges. If you use Challenges, your

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online course will sell like hotcakes.” Someone else will say, “It’s all about joint ventures and affiliates and all of that.”

Guess what? They’re probably all right. Are you going to use all of those strategies? Not if you want to build a business that will serve you. I mean, if you want to build a business that will drive you crazy, of course.

So, you need to be clear on where you’re going. You need to be clear on what’s important to you. You need to be clear on what kind of business you want to build. You need to be clear on what kind of goals you have. And so, that way, when someone says, “Let’s go to New Jersey,” you can say “Nah, I’m going to Chicago. And then you’re not overwhelmed by the different destinations that people are going to because you know where you’re going.

Alright, so this is a simple, simple, simple way audit your month and this is a simple way to kind of cultivate that relationship with your goals so that at the end of the year – even if you don’t hit all your goals – you would have made so many strides because you had your destination on your mind most of the time, just like when you drive. You have your destination on your mind all the time.

You’re not driving aimlessly. So, we shouldn’t go through life aimlessly. So, I want you to go, take a moment, take as long as you need, go do an audit, get yourself ready to make this next 30 days your best 30 days ever, do your part, get your plan in place, and I would love to celebrate you.

So, listen, if you listen to this and you’re like, “Oh my gosh, this has changed my life. This is so amazing.” If you go do your meeting and you’re like, “I have never had the level of mental clarity that I have right now, I have never been in a position where I felt in so much control,” I want you to email me, alright, druna@entremd.com. Let me know about it. Let me know about your experience, okay.

And if you’re here and you have never set goals and you’re not even really sure where to start from, I want you to check out EntreMD On Demand,

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okay. It's entremd.com/ondemand and your first course is how to set effective goals. And you can go on the website and check and you'll see all the reviews from people who have done that with me.

Okay, alright, so I want to leave you with this. You can be that person who will show up December 31st or 12 months from now, whenever you're listening to this, and find out that for the first time in your life you made unbelievable progress, all because you had your annual goals and you did an audit every month because you had a relationship with your goals.

So, I want you to embrace all of this because this could be you, and I can't wait to celebrate it all. Alright, so that's what I've got for you. And go do it. Go do it. If it blows your mind, send me an email and let me know how it went. And I will see you, my friend, on the very next episode of *The EntreMD Podcast*.

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