

*Monica Shah's*

# BIG COMEBACK EVENT

A REVENUE BREAKTHROUGH VIRTUAL EVENT



**VIRTUAL EVENT | DECEMBER 11-13, 2024**



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# BIG COMEBACK EVENT

December 11-13, 2024

# WELCOME

**THIS BOOK BELONGS TO:**

NAME: ..... CELL: .....



# GENERAL INFORMATION

## Event Information

# GENERAL INFORMATION

**We are excited to have you here with us at the  
Big Comeback event!**

**The information below is designed to answer your most commonly asked  
questions and will help make your time with us hassle free!**

## EVENT DASHBOARD

We have an amazing event dashboard that has important information on it about the event, the event schedule, and all handouts. It will be updated fully as we get closer to the event. Check out the dashboard here: [www.BigComebackDashboard.com](http://www.BigComebackDashboard.com)

## CUSTOMER SERVICE

The Revenue Breakthrough team will be on hand throughout the whole event. Whether you're having tech difficulties getting into the zoom session (or have just plain forgotten where your zoom link is) or want to find out more about our other programs and offerings...

**You can contact us in various ways:**

**chat:** In the chat, our Support team will have "Support" in front of their names.

**email:** [support@revenuebreakthrough.com](mailto:support@revenuebreakthrough.com)

**phone or text:** Lauren Davis, Event Manager: (503) 707-2644

## ZOOM ETIQUETTE

1. Do keep your video on as much as you can so that Monica can see you when you ask questions—and so that other attendees can have a sense of "all being in the room together."
2. Even though this event is virtual, it is still disruptive to Monica and to other attendees if you come back late from breaks—please do try to come back on time.
3. The chat—a wonderful tool for these zoom meetings—but all too easy to slip into unhelpful or distracting comments—which then impacts the whole community. We ask you to put only positive and pertinent comments in the chat. If you have other things to say, they are best emailed to us at [support@revenuebreakthrough.com](mailto:support@revenuebreakthrough.com).



## HANDOUTS

Virtual versions of any handouts you may need are located here:  
[www.BigComebackDashboard.com](http://www.BigComebackDashboard.com)

## RECORDING

We are not making available recordings of this event, but we do encourage you to take notes, or to ask other attendees to share their notes if you have to miss a session.

## COURTESY TO OTHER ATTENDEES

Do be on time for sessions. If you are late to sessions, please refrain from interrupting the session in the chat. Our support team is available in the chat if you would like to connect with them directly for questions.

Dear Friend,

**Welcome to The Big Comeback Event!**

It's time to come back stronger.

What do I mean by that?

I mean, get ready to take whatever it is you're dreaming about for your business (and life) – and make it your reality. It's time to take all the lessons we've learned over the years, both good and bad, and use them. Because, over the next 3 days, we're going to create a Certified Revenue Breakthrough Plan.

One that's going to help you build a business that exceeds your expectations and will be resilient no matter what.

We're going to move beyond any obstacles you've had in the past. Whether it's an old belief about money that currently controls how you operate in your business (often without your even realizing it!).

Or maybe it's a certain dollar amount you never seem to be able to get beyond.

You keep capping out there each month, and you're ready to go beyond that and make more money. Then again, it might simply be that you're missing some vital business knowledge – like the correct business model, a target market, a message that makes you stand out, a marketing system, sales skills, or a way to scale up your business (without letting it consume your life).

In our next 3 days together, I am holding two intentions. The first is to give you the information and tools you need to create a breakthrough in your business.

And the second is to surround you in 360 degrees of inspiration to help you move beyond whatever limits have been holding you back... so you can come back stronger than ever. And make the next 12 months the best ones yet.

You can do this. It's totally possible. A better life is reaching out for you... will you reach back?

**Thank you for being here. And, together, let's change the world.**

Love,



# DAY 1: CREATE IT

# YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN

- Step 1: Create Your Dream and Vision**
- Step 2: Create Your Goals and Committed Actions**
- Step 3: Clear Out Limiting Beliefs**
- Step 4: Figure Out Your Offerings and Prices**
- Step 5: Create Your Boundaries Manifesto**
- Step 6: Create Your Annual Projections**
- Step 7: Determine Your Target Market + Message**
- Step 8: Create Your Sales Plan**
- Step 9: Create Your Marketing Plan**
- Step 10: Create Your Monthly Schedule**
- Step 11: Create Your Quarterly Goals**
- Step 12: Create Your Weekly Plan**
- Step 13: Create Your Daily Plan**
- Step 14: Create Your Support Plan**

**STEP 1:**  
**Create Your Dream and Vision**  
**THINK BIGGER**

# AGE IS IRRELEVANT

At 43 John  
F. Kennedy  
ran for the US  
Presidency, and  
won.

At 86 Ruth Rothfarb  
ran the Boston Marathon  
in just over five hours.  
“You lose a lot of speed  
between 80 and 86,” she  
joked.

At 57 Ray  
Krock founded  
McDonald's.

# MAKING IT POSSIBLE

## DREAM

- The pictures in your head of what you want.

## VISION

- What pays for your dreams.

## GOAL

- The tangible milestones in pursuit of your vision.

## COMMITTED ACTIONS

- The actions you take, no matter the results, to achieve your goal.

## AN EXAMPLE

### DREAM

- A new home. A trip to France. College tuition saved.

### VISION

- My interior design business.

### GOAL

- Generate \$100,000 this year.
- Sign 11 major clients at \$5000+, 15 at \$3,000+.

### COMMITTED ACTIONS

- Business
  - Follow my RB marketing checklist.
- Health
  - Work out 4 times a week.
- Spirit
  - Meditate 2 times a week.

## SARA MADE 4 TIMES MORE AND LEARNED TO TRUST HERSELF!

During my year in RISE, I more than quadrupled my revenue as compared to the previous year. That is mind-blowing to me. But what is perhaps even more mind-blowing is that I trust that I know how to make money, and that I can do so with integrity.

**Sara Glancy**  
**Public Speaking Expert**



# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 1: Create Your Dream and Vision**

# DREAM PLAN

What do you want to be doing, having, being in 3 years?

Your Age \_\_\_\_\_ (fill in your age in 2027)

# DREAM PLAN

What do you want to be doing, having, being in 5 years?

Your Age \_\_\_\_\_ (fill in your age in 2029)

## DREAM PLAN

You have all the money you need. Time is also not a concern. What will you do with the money?

# DREAM PLAN

What are your ideas to make the world better?

**“Success is the side-effect of your personal dedication  
to a cause greater than yourself.”**

**– Viktor Frankl**

## CHOOSE YOUR VISION

My Business Is:

In 3 years I want my business to look like this:

**The moment that you think it is possible  
– then the magic starts.**

## RISE HAS GIVEN BENITA MORE CONFIDENCE!

The RISE Business Academy has validated that I have been building a solid path, given me confidence this year, and mostly certainty in choosing Monica as my next stage coach.

**Benita Samuels,**  
**Digital and Social Media Visibility Expert**



## TRENIA IS REACHING OUT TO HER TARGET AUDIENCE!

RISE has given me the foundational elements of running a real business. My target audience has gotten more clear and I'm even more focused on bigger opportunities to get in front of more of the right people.

**Trenia Parham**  
**Leadership Coach**



## **STEP 2: Create Your Goals and Committed Actions**

# GOALS AND COMMITTED ACTIONS

## GOALS – A DEFINITION

- The tangible milestones in pursuit of your vision.
- To be accomplished in the next 12 months.

## COMMITTED ACTIONS – A DEFINITION

- An action that you are committed to doing no matter what the outcome or external circumstances.
- It has a measurable action step in it with a frequency so that you can track whether you did it or not.

# 12 MONTH GOALS + COMMITTED ACTIONS



## HEALTH: TO LOSE 15 POUNDS

- Work out 4 times a week
- Eat healthy during the week – no more than two meals out



## SPIRIT: TO FEEL MORE CONNECTED

- Meditate once a week
- Journal once a week



## RELATIONSHIPS: TO HAVE AN AMAZING RELATIONSHIP WITH MY FAMILY

- Visit my family once per quarter
- Talk to every family member once a week



## BUSINESS: EARN \$200,000

- Reach out to 15 people a week
- Do at least 3 speaking events per quarter



## SELF/PERSONAL: LEARN SPANISH

- Take Spanish classes with Berlitz to get to level 2
- Take a trip to Spain in the Fall and stay with a Spanish-speaking family

## **JEANIE GREW HER BUSINESS BY \$100K!**

Since joining Platinum a year ago, I made almost \$100K more than the year before. The program gives a direct 1-on-1 relationship with Monica, and we're able to curate and nurture my already successful business, plus groom for growth and expansion.

**Jeanie Engelbach**  
**Professional Organizer, Interior Stylist**  
**and Lifestyle Curator**



# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 2: Create Your Goals and Committed Actions**

## STEP 2: CREATE YOUR GOALS AND COMMITTED ACTIONS PLAN

HEALTH	SPIRIT	RELATIONSHIPS
⋮	⋮	⋮
Committed Action	Committed Action	Committed Action
⋮	⋮	⋮
Committed Action	Committed Action	Committed Action
⋮	⋮	⋮
Committed Action	Committed Action	Committed Action

## STEP 2: CREATE YOUR GOALS AND COMMITTED ACTIONS PLAN

BUSINESS	SELF/PERSONAL
⋮	⋮
Committed Action	Committed Action
⋮	⋮
Committed Action	Committed Action
⋮	⋮
Committed Action	Committed Action

# PLANNING TYPES

## WHAT PLANNING TYPE ARE YOU?

Out of 100%, write down what percentage you are of each type:



### NURTURERS:

Responsibilities to family and friends are important

.....  
**(percentage)**



### ACHIEVERS:

Desire experiences and “stuff”

.....  
**(percentage)**



### WORLD-CHANGERS:

Crave status, impact, leadership, a platform

.....  
**(percentage)**



### FREEDOM-SEEKERS:

Need time off, travel, rest time, retreats, creative space

.....  
**(percentage)**

# MOTIVATION PLAN

## What is important to you? Check your top 3

Family	Travel	Impact
Money	Status	Community
Friends	Great Food	Meditation/Prayer
Vacations	Alone Time	Respect
Self Time	Great Clothes	Free Time
My Home	Fitness	Relationship with Spirit

## What motivates you? Check 2 of the motivations below

### Intrinsic

- Impact
- Challenge
- Relationships
- Personal Development
- Desire to Help/Create Change

### Extrinsic

- Status
- Money
- Stuff
- Image

## MONEY + TIME

**What  
are the top 3-5  
things that you spend  
your money on?**

**What  
are the top 3-5  
things that you spend  
your time on?**

# **STEP 3:** **Clear Out Limiting Beliefs**

## HOW DID YOUR MOM, DAD AND FAMILY TALK ABOUT MONEY WHEN YOU WERE GROWING UP?

Who do you think you are?  
Rockefeller's daughter?

You have to work hard to  
make a lot of money.

Rich people are mean.

Money doesn't grow  
on trees.

Do you think I'm  
made of money?

## WHAT WAS MONEY LIKE FOR YOUR FAMILY AND FOR YOU?

We never had enough.

I never really thought  
about money. It was al-  
ways there.

My parents were always  
fighting about money.

We always had money.

## WHAT DID YOUR PARENTS DO WITH THE MONEY THEY DID BRING IN?

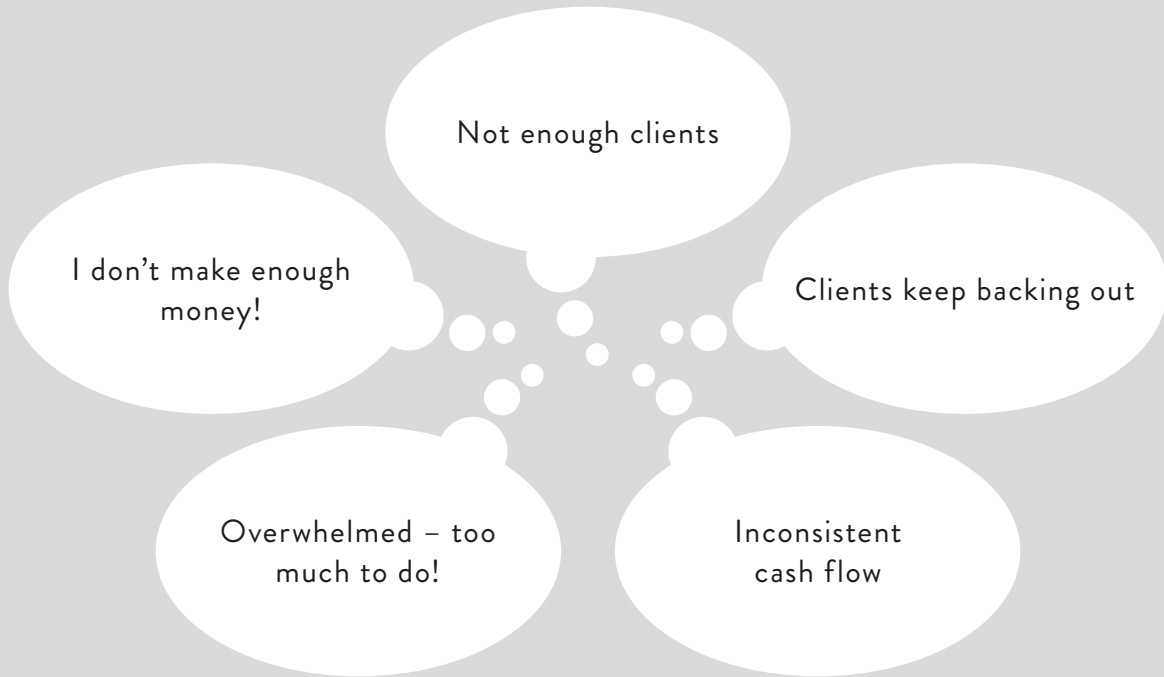
There was never  
enough of it to spend.

I never saw the  
money. I have no idea.

They spent it all.

My mom spent it on herself.

## WHAT ARE YOUR CURRENT BUSINESS STRUGGLES?



# SARAH WORKED THROUGH HER MONEY VOICES

I've worked through my beliefs around asking for money and my fear around asking for help. I've increased my revenue by 15% in the last week, stopped taking insurance and started selling packages. I'm thrilled!

**Sarah Klein**  
**Natural Doctor**

## WHAT ARE YOUR VOICES SAYING?

<b>Root experience</b>	<b>Current voice</b>
<b>How this affects my business</b>	<b>New voice</b>

## CARMEN GOT THREE NEW CLIENTS!

In just one month in RISE, I got a proposal accepted, I converted an old 1:1 personal training client to my monthly exercise program, and I got my first full holistic coaching client after my first sales call!! I'm truly learning so much and boosting my confidence with RISE!

**Carmen Miranda**  
**Health Coach and Personal Trainer**



# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 3: Clear Out Limiting Beliefs**

# YOUR NEW MONEY VOICE

## READ IT BEFORE:

- Going out to business events or meetings
- Sales conversations
- You decide on your prices for services
- You start your work day

If I truly believed this statement, I would do these activities differently in my business:

**STEP 4:**  
**Figure Out Your Offerings and Prices**  
**MAKE DECISIONS**

# DECISIONS REQUIRE FAITH

## YOUR EPIC SELF

- Signs that you are indecisive:
  - procrastination and being easily distracted
  - letting yourself or others down
  - physical exhaustion
  - mental exhaustion

## DECISIONS REQUIRE TESTING



# OFFERINGS MAP

## BASELINE INCOME – START HERE

- Programs, Retainers, Proposals
- Rolling Group Programs
- Other Sources of Income – job, savings, family money, loans, credit cards
- Products, Services & Events (must sell enough to cover baseline expenses)

## TOPLINE INCOME

- Products
- Group Programs
- Books, Events, etc.

## SCALE INCOME

- More Products
- Larger Group Programs
- More and Larger Books, Events, etc.

## EMPIRE INCOME

- More Products
- Larger Launches & Events
- Higher Prices, More Sales

# TYPES OF BASELINE OFFERINGS

**EVERY BUSINESS SHOULD HAVE SOME SORT OF BASELINE INCOME.**

- 1:1 Programs (working privately with you)
- Hybrid Programs (Can include 1:1 + group events or classes)
- VIP Days
- Maintenance Programs (for clients after 1:1 work with you)
- Retainer
- Proposals
- Physical Products

# REVENUE STREAM: 1:1 PROGRAM

- Programs versus Packages
- Length of Time
- Number of Sessions Each Month
  - Coaching Time vs. Teaching Time
  - Intensive Time
  - VIP Time
- Group or Individual
- Extras:
  - Access to you via E-mail or Facebook
  - SOS Calls
  - Bonuses

# REVENUE STREAM: 1:1 PROGRAM

## BASIC SUGGESTED 1:1 PROGRAM

- One on One
  - 3-month program OR
  - 6-month program
- Investment (examples)
  - \$350 a month or pay in full of \$900
  - \$550 a month or pay in full of \$1,500
- Logistics:
  - (3) 30-45-minute sessions a month
  - (1) 60-minute VIP intensive session
- Extras:
  - Access to you via email or Facebook
- SOS Calls
  - Bonuses (up to you)

# REVENUE STREAMS— ROLLING GROUP PROGRAMS

- Group Program
  - Ideally, start with 6 people
  - Then keep adding people each month
- Pros & Cons
  - Pro: Can add people any time
  - Con: Material must be circular
- Extras:
  - Access to you via email or Facebook
  - 1:1 Calls
  - SOS Calls
- Bonuses (up to you)

## REVENUE STREAM: RETAINER

- Length of Engagement
- Services/Scope
  - What is included—hours, work, expectations
- Investment
  - Will the payments be monthly or weekly?
- Usually requires a relationship to be built first and then movement into a retainer

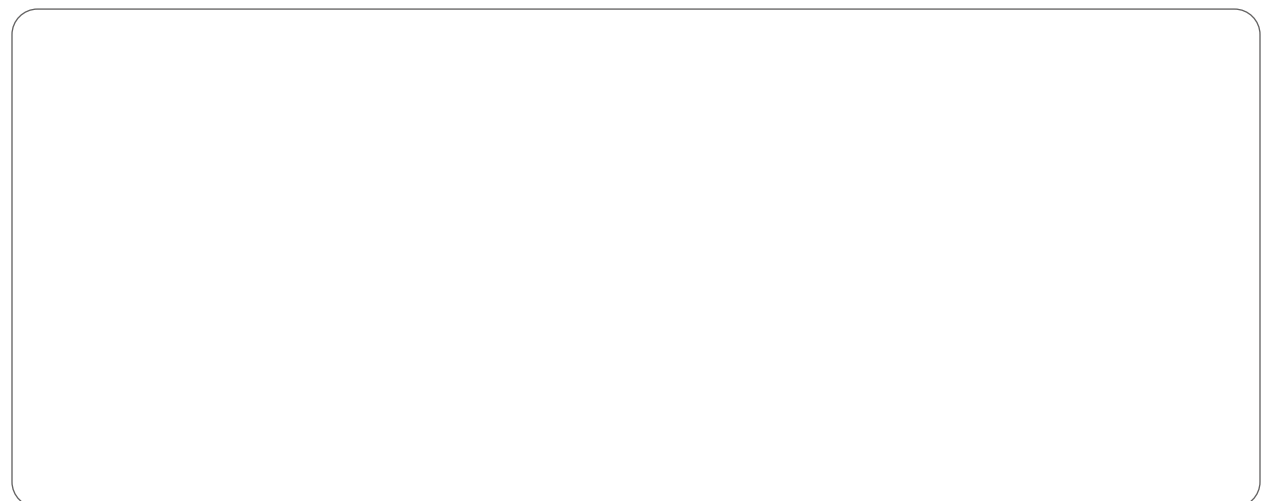
## REVENUE STREAM: PROPOSALS

- Presenting proposals
  - Don't fall into the internet dark hole
- Deliverables
  - What are the outcomes?
- What's included
  - Meetings, reviews, trainings, discussions
- Investment
  - Regular payment
  - Fast action savings

# TYPES OF TOPLINE OFFERINGS

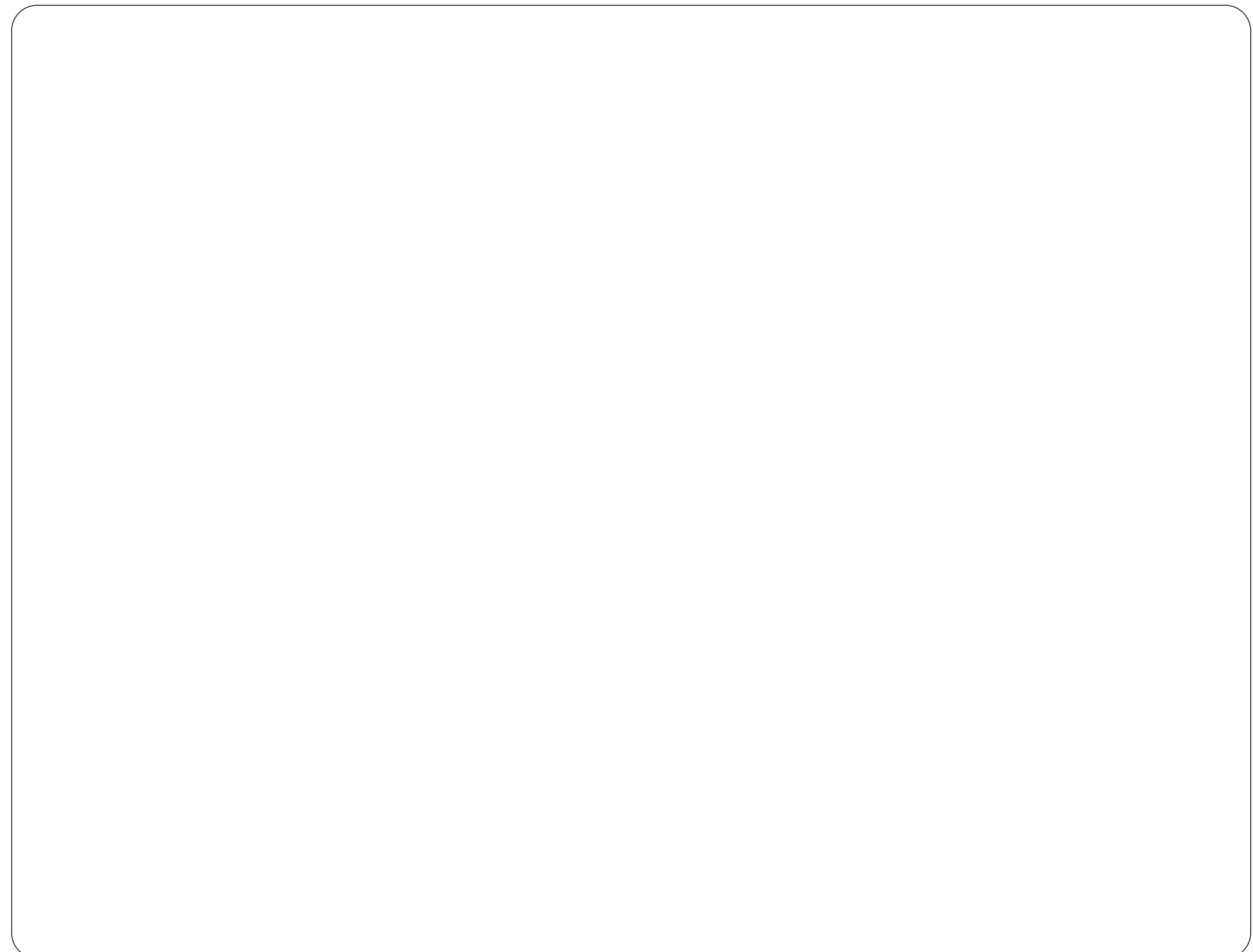
## OFFERINGS

- 3–6 Month Longer Group Programs
- 4–5 Week Shorter Group Programs
- Continuity Programs/ Low Priced Clubs
- Retreats
- Audio/Video Courses with Handouts
- Digital programs
- Large Masterminds
- Large Events that intend to make money on selling tickets
- Large launches of any sort
- Tech Products (Software)
- Physical Products
- Events That You Have to Fill With Your Own Audience  
(not partnering with an organization that fills the event for you)



## **REVENUE STREAMS: TOPLINE INCOME—GROUP PROGRAMS + DIGITAL COURSES**

- Develop & nurture newsletter list—of at least 1,000
- Test! Test! Test!—suggest doing live before turning into a product
- Create your launch plan ahead of time
- Build strong relationships with Joint Venture partners
- NOT baseline income



## TOPLINE INCOME: PHYSICAL PRODUCTS

- Need to locate a distribution channel
  - Online
    - » e.g. website, Etsy
  - Your Own Retail Location
    - » e.g. craft fair, cart in a mall, your own store
  - Third Party Retailer e.g. local boutique, department store
  - Distributors
  - Trade Shows
- Understand your breakeven numbers
- Hard to make baseline income without a distributor

## TOPLINE INCOME: EVENTS THAT YOU FILL WITH YOUR OWN AUDIENCE

- Tips to fill events:
  - Call team
  - Referral partners
  - Joint ventures
  - Local speaking
  - Tour stops
- May be used as a channel to sell programs
- Difficult to use ticket sales as a baseline income

# BATTLING THE FRAUD FACTOR

It is normal to feel like a new version of yourself when you are playing a bigger game.

1. What is the bigger game?

2. What did you do to get here?

3. Why do you deserve it?

4. What does your inner wisdom know to be the truth about this new price-point (opportunity)?

5. What does your Epic Self think?

## RAHTI SURPASSED HER QUARTERLY GOAL!

My original revenue goal for Q1 was \$20,000. Working with Monica, taking into account the realities of my life, I re-assessed my goal to \$14,250. As of today I've surpassed my original goal!

**Rahti Gorfien**  
**ADHD, Creativity and Life Coach**



# PRICING STRUCTURES: PROGRAMS

## PRIVATE PROGRAMS

- Starting at: \$300–\$500 a month (\$500 is ideal)
- Moving upwards from there to \$2,000 a month or more
- **Strategy:** To create your baseline income.

## 4-5 WEEK GROUP PROGRAMS

- Between \$195–\$495 for the whole program
- **Strategy:** To allow people to get to know you and build your fan base. This also creates upsell opportunities down the road.

## 9-12 WEEK GROUP PROGRAMS

- Between \$997–\$1,997
- **Strategy:** To build your fan base and great for JV partner launches.

## 4-6 MONTH GROUP PROGRAMS

- Between \$300–\$900+ a month (usually less than half the price of your one-on-one program prices)
- Can use a non-refundable deposit + payments.
- **Strategy:** To create leverage in your income.

# PRICING STRUCTURES: PRODUCTS, EVENTS, RETAINERS AND PROPOSALS

## PRODUCTS:

- Anywhere from \$7 e-books to \$1,997 audio/video programs with handouts.
- **Strategy:** To allow people to get to know you and get started with you at a lower price point. Allows for upsells down the road to group and private programs.

## EVENTS:

- Anywhere from \$97 for a one-day event to \$495 for a 3-day event to \$997+ for an intensive
- **Strategy:** To experience you at a live event and get to know you very well. Also a great way to invite people into higher-level programs.

## RETAINERS:

- Services/Scope
  - What is included – hours, work, expectations
- Investment
  - Will the payments be monthly or weekly?

## PROPOSALS:

- Investment
  - Regular payment and fast action savings
  - Set up meetings to review the proposals

# PRICING STRUCTURES: GOODS, TECH AND OTHER PRODUCTS

## RESEARCH YOUR EXPENSES

- How much will it cost you to make the product? This is your minimum price.
- Include both the materials and the value of your time (most entrepreneurs don't include a realistic estimate of their time).

## RESEARCH THE INDUSTRY

- What are other people charging for similar products? Call competitors or buy products to find out more.
- What is the top price in the industry?
- What is the bottom price?
- This gives you a range to work with.

## THINK ABOUT THE VALUE OF THE PRODUCT

- Is it worth more?
- How could you price it accordingly?
- Can you go above your competitors? What needs to happen for you to do so?
- What qualities can you add that make your product worth more?

# FRAN'S ON TRACK TO MAKE MORE IN 3 MONTHS THAN SHE DID ALL OF LAST YEAR!

I had a bunch of marketable skills, but no clear path to make them work quickly. In 20 minutes with my RISE coach, we had a plan and pricing. Now I am on track to make more in my first quarter than I did all last year.

**Fran Watson**  
Transition and Life Coach



# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 4: Figure Out Your Offerings and Prices MAKE DECISIONS**

# REVENUE STREAMS PLAN

<b>Type of Offering</b> (group program, 1:1 program, retainer, proposals, etc)	<b>What is included in the offering?</b> (# & length of sessions, months, email access, length of program, bonuses etc. If you are doing proposals or retainers, it's OK if you don't know the details now, just write what you know)	<b>Price</b>

**STEP 5:**  
**Create Your Boundaries Manifesto**  
**MONEY FLOWS TOWARDS THOSE**  
**WHO RESPECT THEMSELVES**

# BOUNDARIES CREATE CONNECTION

- When you say Yes and don't mean it, you are hiding the REAL you
- You start to feel resentful and fake
- This creates distance between you and those you care about
- Upholding boundaries actually creates a deeper connection

## HELPFUL THOUGHTS

“I say No when I want to, and people love me just the same.”

– Amy Ahlers

“I don't shrink. I don't puff up. I stay in my sacred space.”

– Brené Brown

“The most exhausting thing in life is being insincere.”

– Anne Morrow Lindbergh

# SCRIPTS FOR SETTING BOUNDARIES

## Boundary Conversation on Increasing Prices

**You:** Hi, I'm so glad you've been with me for such a long time. I'd like to let you know that I'm going to be raising my prices by \$200 per month.

**Client:** That's absolutely crazy. There's no way I can afford that.

**You:** I'm sorry that you feel that way. I'm happy to coach you through it. It is a decision that I've made with lots of thought and reasons.

Here are some of the reasons that I'm raising my prices.

As I'm looking to help you grow, I'm looking to grow myself. If I'm going to embrace growth for you then I have to embrace it for myself. I've learned a lot over the last two years and my ability to coach my clients has grown. It's time for me to charge for that.

**Client:** I just have to think about it.

**You:** Yes, let's talk again on Friday? Would that work? I really think you'd get a lot out of continuing with me. We could work on helping you get your closet organized, create a system for your office, and start work on the kitchen [insert other business if you like].

# SCRIPTS FOR SETTING BOUNDARIES

## Boundary Conversation on Building a New Business

**You:** Hi \_\_\_\_\_. I am super excited about my new business. But I am realizing that it's taking up a lot more time than I thought so I need your help. Could you be available to watch Sammy from 6-8pm on Tuesday and Thursday nights? That way I can work on my business uninterrupted.

**Other:** But you have not made any money in your business yet and I am also busy with my work.

**You:** Yes, I realize that—but I need some extra time so that I can make my business profitable. Another option would be for us to hire a babysitter for that time.

**Other:** OK, how long will you need my help?

**You:** Let's try it for 6 months and then we can sit down and discuss if we need to continue this arrangement.

**Other:** OK, but I am not happy about your request.

**You:** I know this is a change for you, but my business is important to me.

# SCRIPTS FOR SETTING BOUNDARIES

## Boundary Conversation about Asking for Help

**You:** I'd like to ask for your help. My business is getting very busy and taking up more of my time. This has made it difficult for me to keep up with all my duties in the house and at work. I am stressed and feel like I can't relax with you or our friends.

**Other:** OK

**You:** I would like to discuss how you can support me by taking care of dinner two days a week and assisting with the laundry.

**Other:** I do not know how to do meal prep or laundry and am not sure if I can do them.

**You:** I believe you can and will show you how. For meals, you can get take-out on your nights if that is easier for you.

**Other:** OK. I am willing to try.

**You:** Great! Let's try it for a week and then we can discuss how it's going for you.

# SCRIPTS FOR SETTING BOUNDARIES

## Boundary Conversation about Saying Yes

**You:** Hi \_\_\_\_\_[fill in other]. Have you noticed that I have a bad habit of saying Yes when I really want or need to say No? [insert other boundary concern, as applicable]

**Other:** I didn't notice that.

**You:** Well, I've decided that I am going to start setting some boundaries by saying No. I've realized that by saying Yes all the time, I'm not expressing the way I really feel. I end up doing things that I don't want to do and, as a result, I'm becoming resentful. In essence, I'm hiding behind my Yeses.

**Other:** I didn't know that.

**You:** I could really use your support here. Will you be OK if I say No sometimes and be more me?

**Other:** I'll try. But I may not like it.

**You:** It's OK, we'll deal with it as it comes up—I just wanted to let you know what I was thinking and where I was at.

# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 5: Create Your Boundaries Manifesto**

## BOUNDARIES MANIFESTO: TIME

What are your working hours?

What are your working days?

What is your work schedule over the course of the year? What months do you take off?

When and why and how do you travel?

How much time do you spend with your clients?

## BOUNDARIES MANIFESTO: SCHEDULING

What happens when a client reschedules?

What happens when a client shows up late?

What happens when a client doesn't show?

What happens when a client asks for something outside the agreement?

## BOUNDARIES MANIFESTO: MONEY

How much am I willing to negotiate on my prices?

What is the lowest I will take?

How long will I wait to receive payment?

What do I do if a client doesn't pay?

What kind of payment plans work for me?

Will I take credit cards, checks, cash?

## BOUNDARIES MANIFESTO: RESPECT AND FIT

Who are my ideal clients?

Am I willing to take non-ideal clients right now?

What am I willing to do/not do for them?

What happens when a client asks for a return?

## BOUNDARIES MANIFESTO: PERSONAL

How many hours will I work a day?

What am I willing to commit for this business?

What self-care is non-negotiable?

What do I tolerate with family/friends?

## LISA BUILT A \$115,000 COACHING BUSINESS IN ONE YEAR!

I was a successful business owner and had toured the world as a bellydance teacher—BUT I was so scattered. The value I received from taking part in RISE was an equal measure mindset—how to become the woman who can build a \$500,000 business and the tactics and tools to build it. In one year I built a coaching business that made \$115,000 and changed women's lives. It's May and I've already made \$100,000 this year.



**Lisa Zahiya**  
**Business Expert**

# DAY 2: BUILD IT

# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 6: Your Annual Projections + Inspiration**



# ONE-PAGE GOAL CHART

- Insert your goal for the year
- Insert your offerings
- Insert your prices
- Insert your goal quantity numbers
- Works well for smaller goals until your numbers won't fit on one page

The image shows a handwritten example of a one-page goal chart on graph paper. At the top, it says "Yearly Goal: \$120,000". Below this, there are three sections, each with a list of 10 numbered lines for entries:

- Private Clients (#6,000): A list of 10 numbered lines.
- Group 1 (Spring, #3,000): A list of 10 numbered lines.
- Group 2 (Fall, #3,000): A list of 10 numbered lines.

# WHAT ARE YOUR ANNUAL WORDS?

- Pick 3 words for the year
  - 1 is about you
  - 2 are about your business

## EXAMPLES:

- Consistency
- Power
- Delegation
- Wealth
- Love
- Team
- Purpose
- Focus

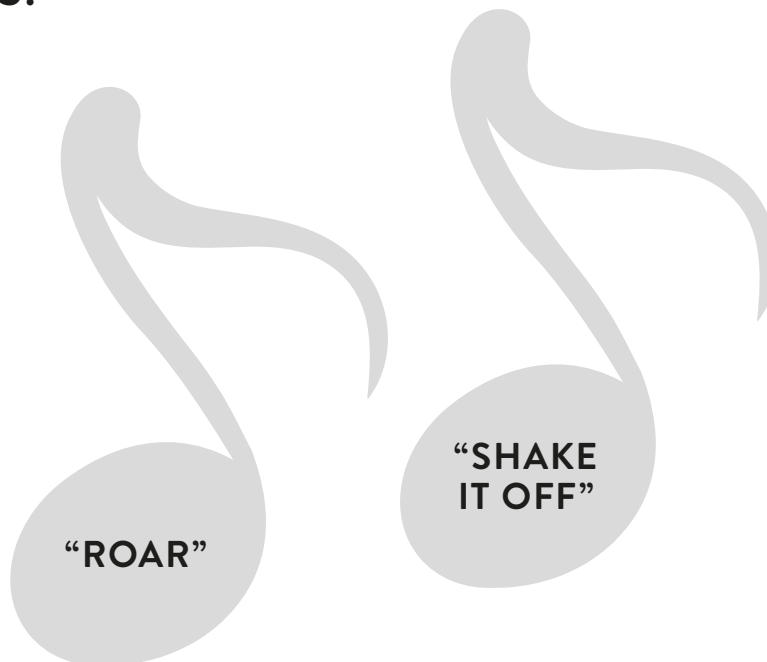
## YOUR THREE WORDS:

--	--	--

# WHAT IS YOUR THEME SONG?

- Sets the tone and reminds you of your goals
- Pick a song with a line you love, a beat that reminds you of an emotion or a chorus that is you
- Every word doesn't have to be perfect

## EXAMPLES:



**Your Theme Song:**

## RISE NUDGED KIMBERLY INTO ACTION!

I first learned Monica's technique about reach outs when I joined RISE. I'm already scheduling with so many people about privates, my group program, and events. Wow, way to nudge this dreamy introvert out of her shell and into action!

**Kimberly Harrison**  
**Holistic Vocal Empowerment Coach**



# **STEP 7: Determine Your Target Market and Message**

# YOUR TARGET MARKET



## HOW TO DEFINE THE GROUP OF PEOPLE THAT YOU WORK WITH

- Demographic: age, gender, race, religion
- Psychographic: behavior, likes, dislikes, interests, hopes, dreams, personality traits, feelings
- Geographic: where they live, work, grew up
- e.g. Women in their 30s who feel like they don't fit into the traditional job setting
- e.g. Men in their 60s who have recently retired

# THE PROBLEMS YOU SOLVE

## WHAT PROBLEMS DO YOU SOLVE?

- Solve Wake-Up-in-the-Morning Problems
- People pay you to solve their most urgent needs:
  - “I need to lose weight.”
  - “I’m lonely. I want a life partner.”
  - “I want a different life partner.”
  - “I need more money.”
  - “My body aches. I need to stop the pain.”
  - “I hate my job.”

**Ideally choose one wake-up-in-the-morning problem, but you can have more than one specialty or expertise.**

## A SELECTION OF WAKE-UP-IN-THE-MORNING PROBLEMS

- Money (make more, save more)
- Health (pain, weight loss, energy, digestion, disease, fertility, hormones)
- Love (find a partner, find a new partner, relate differently with current partner, divorce)
- Job (new job, happier in current job, start a business)
- Business (start, grow, scale)
- Spirituality (find connection, strengthen connection)\*
- Family (kid issues, aging parent issues, sibling issues, education issues)
- Home (organize, buy, sell, move, renovate)

## SUSAN'S BANK ACCOUNT BRINGS HER COMFORT!

I just realized that I've been looking at my bank accounts lately because I want to feel comforted! I am going to my MONEY for comfort right now!!! That is a minor miracle in my life and YOU were a big part of that.

My money is always here for me! It can comfort me in scary times. It's a resource to support and help me, my family and my community. What a gift!

**Susan Powell**  
**Massage Therapist**



# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 7: Determine Your Target Market and Message**

# YOUR TARGET MARKET

1. WHO IS THE GROUP OF PEOPLE YOU SERVE?

2. WRITE DOWN 5 WAKE-UP-IN-THE-MORNING PROBLEMS OF THE GROUP OF PEOPLE THAT YOU SERVE. NOW PICK THE TOP 1 THAT YOU ARE GOING TO FOCUS ON FOR NOW. CIRCLE IT.

*e.g: I need more money. I'm tired. I need a partner. I'm fat. I hate my body. I need to start exercising. My back hurts.*

**Generally these problems are about:** health, money, relationships, family, business issues, career

01:

02:

03:

04:

05:

# WRITING DOWN YOUR VERBAL MESSAGE

## 3. WRITE YOUR ELEVATOR PITCH

**I help people who are struggling to/want/wish they could ABC (ABC is the wake-up-in-the-morning problem) find a way to DEF (DEF is the resolution of the wake-up-in-the-morning problem).**

*I help women who are struggling to release weight and unhappy with their bodies, find a way to make peace with food and fit into all the clothes in their closets (especially the skinny ones!).*

**I have a line of products that are AAA (products you provide), and they help people who are struggling with XXX (problem). They help people do YYYY (solution).**

*I create make-up that serves women with skin discolorations who are looking for products that make them shine for their big events. My products provide amazing coverage and are so healthy for your skin.*

## ANNE HAD HER MOST PROFITABLE YEAR!

The RISE program gave me the tools, training, and discipline to create consistent results and increase my revenue. Monica has helped me to become a more intuitive leader, a team builder, and a better planner. Last year was our most profitable year to date, with revenue rising very close to seven figures.

**Anne Kenney**  
**Certified Staging Professional**



# THE STRUGGLE STORY

**Purpose is to let your audience see:**

- You were once like them
- You overcame it
- If you can do it, they can do it too!

**THE 4 PARTS OF A STRUGGLE STORY:**

## **1. What did you struggle with?**

- You want the struggle you tell about to be something your ideal clients can relate to. Have you struggled with thinking you'll never find love, and now help other women through it? Tell us that story.
- Paint a picture of what that struggle looked like for you. What it felt like. Give us some details.
- I would sit at home alone and eat ice cream by the gallon. The dull ache in my belly just got worse and worse. And I started avoiding all my friends who couldn't stop talking about their dating life.
- I lived off the checking overdraft for 3 months, every time wondering if this was my last \$20.
- I dreaded walking into work each day, wondering what mood my boss would be in and what colorful name she would call me in the name of "helpful critique."

## **2. What was your turning point?**

- This is where you hit rock bottom.
- Or you had an AHA moment.
- Or you told yourself, "Never again."
- Build the tension, take us to a specific time, and set the scene. Bring us into that moment with you.
- I sat down on the subway floor, my bags piled around me. People walked by me, giving me strange looks or just politely averting their eyes. The tears started to come down, and I realized that I couldn't take this anymore. I gave myself a year.
- Don't cheat us out of the details. Close your eyes and take yourself back to that moment in time. Where were you? What were you doing? What was around you? What did you experience physically, emotionally, or spiritually?

## THE STRUGGLE STORY

### **3. What was the realization you had or the resolution you made as a result of that moment?**

- This could be where you decided to do whatever it took never to be at this place again.
- Or you realized that your old approach was causing you more harm than good.
- What was the decision or realization that changed your life?

### **4. What is life like now?**

- What have been your results since? Don't forget to paint the success side of your story.
- How have you been helping other people with the same problems? What have been their results?
- What is your system for helping others? Do you have steps that you could talk about? Or products that are your favorites that really work?

## QUIANA QUADRUPLED HER INCOME!

I'm excited to say that I've quadrupled my income since starting RISE! It's become totally fun to track my numbers. Instead of saying that "I have a practice" now I can say, "I have a business." The biggest thing is I don't feel apologetic about it.

**Quiana Grace Frost**  
**Founder / Energy Medicine Practitioner for**  
**Conscious Evolution**



# THE SOAPBOX STORY

**The purpose of a Soapbox Story is to let your audience see...**

1. They're not alone.
2. You have the solution.

## THE 4 PARTS OF A SOAPBOX STORY:

**STAND: Before you start to articulate your soapbox story, you have to know what your stand is. What are you taking a stand for?**

What is the message you want the world to know? The thing you're so passionate about, that you would stand up on a soapbox in the middle of the street to tell people about it? This could be the same as your Point of View.

If you're not sure, think about what upsets you. Or maybe something you see in your industry that bothers you. What breaks your heart? Or what part of your work gets you super passionate?

**Note:** you don't have to TELL your stand at the beginning of your story. You can save it for the end. But when you're writing your story, you do want to start by knowing what your stand is.

1. **Think of a client or another person whose struggle you want to highlight. The struggle that person is going through relates to your stand (see below for the stand). Give a specific example of when you saw this happen.**

Maybe you saw someone struggling with something you already understood. It could be a client, a friend, a family member, or even a complete stranger.

Give us specific details. Again, paint the picture and take us there.

Include a turning point (just like in the Struggle Story).

Use all the elements of the Struggle Story.

2. **What was your realization or resolution when you saw this happen?**

Hint: the realization is probably closely related to your stand or POV.

This could be the AHA moment that made you see you could help other people with this thing you've always had a knack for.

# THE SOAPBOX STORY

### 3. Why is it important for others to take on your stand?

What will happen if they DON'T take on your stand?

And what is possible (the dream) if they DO take it on?

This could be similar to the Consequence you came up with for your POV.

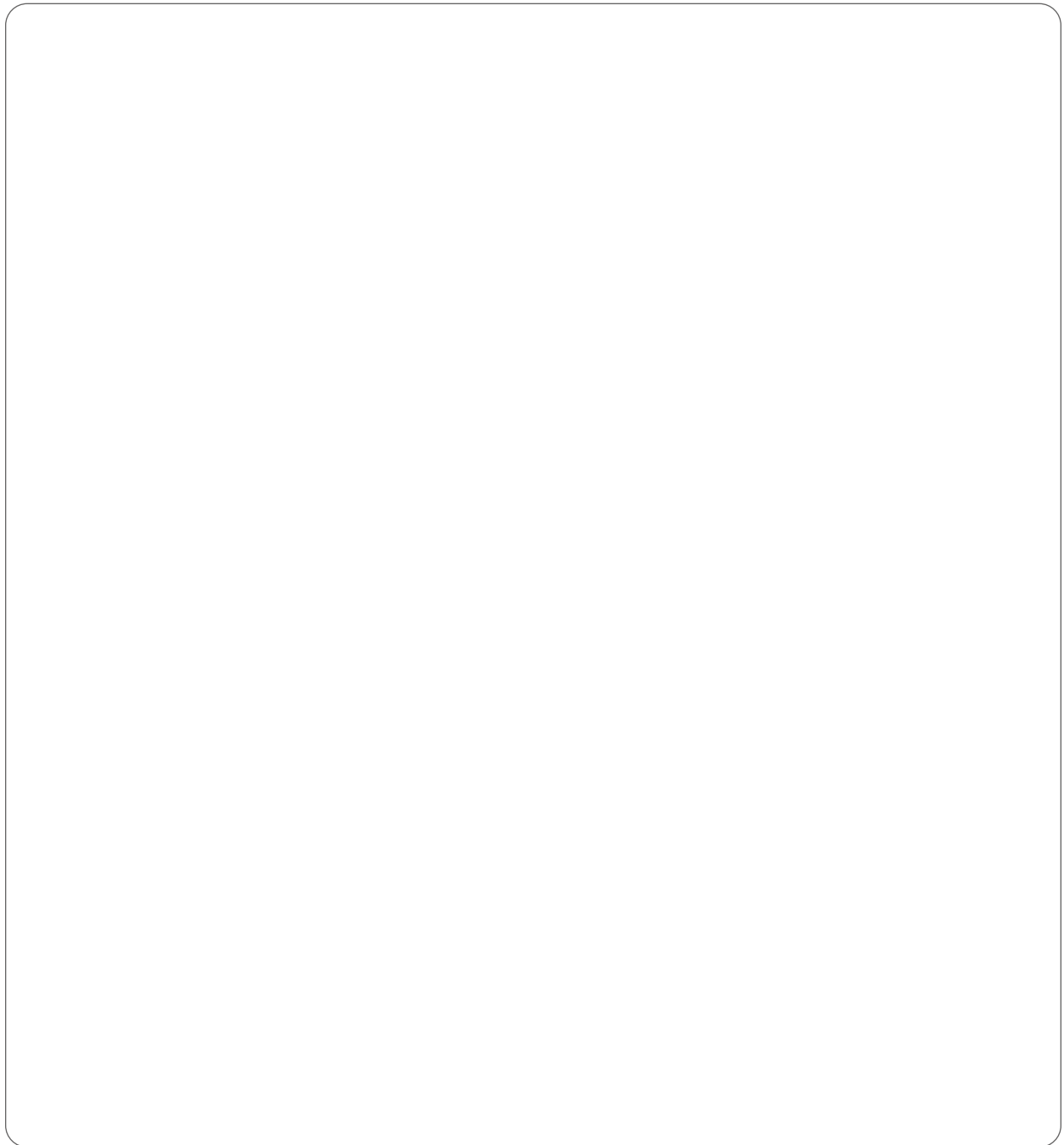
**You can use the phrase,**

Now I help

do

so they can

# WRITE YOUR SOAPBOX OR STRUGGLE STORY:



**STEP 8:**  
**Create Your Sales Plan**  
**RUNNING THE NUMBERS**

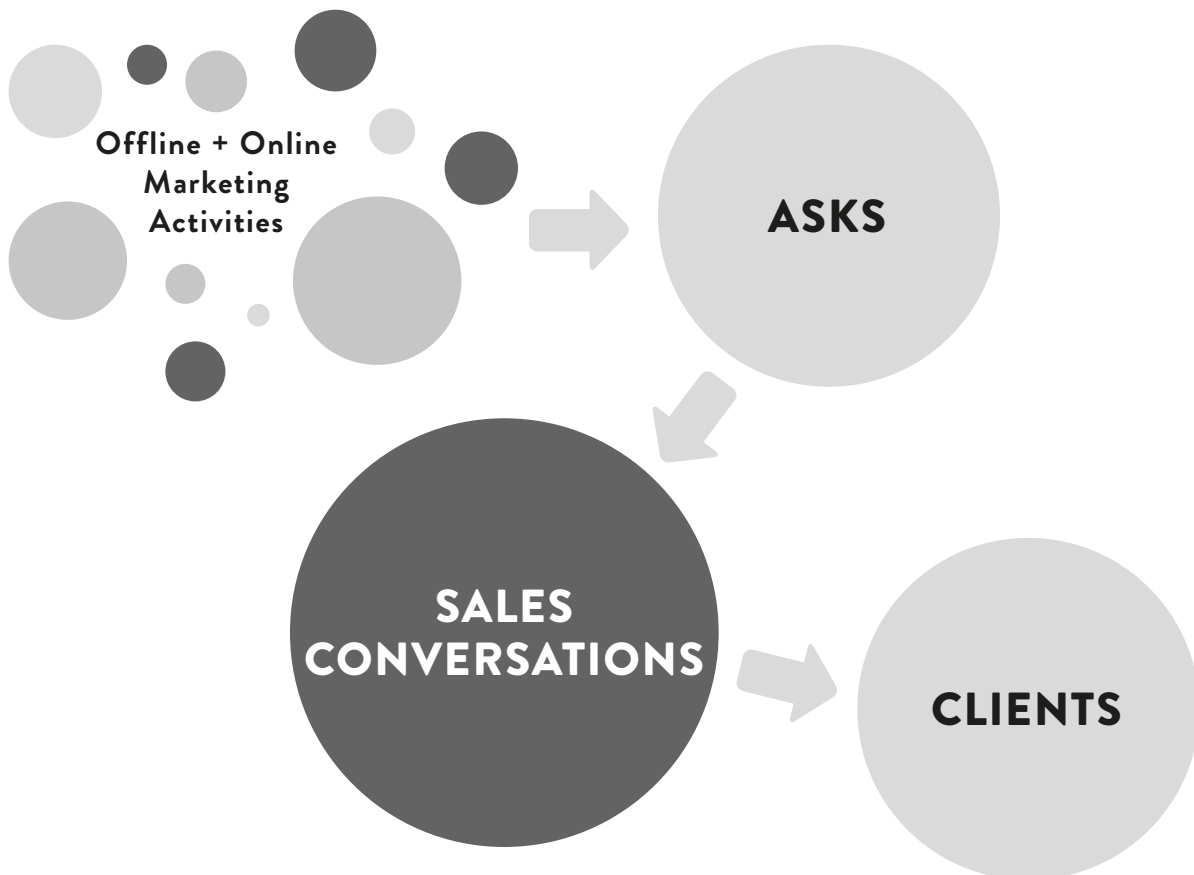
## KEY ACTIVITIES

### MARKETING

- Sharing your wisdom through activities that get you in front of people. Building relationships.

### SELLING

- Inspiring people to say Yes to get help from you by asking for money or opportunities (people, organizations, distributors).



## SALES PLAN: HOW MANY SALES CONVERSATIONS DO YOU NEED? FOR SERVICE PROVIDERS

1 How many clients do you want in the next 90 days? (#1)

2 What is your conversion rate?

One out of every (#2) people says yes to working with you. (If you don't know, use 1 out of 3).

3 How many sales conversations do you need to have?

Multiply the number of clients you want (#1) by the number of people you need to do sales conversations with to so that ONE says yes to working with you (#2). (If you don't know, use 1 out of 3).

$$\text{(#1)} \times \text{(#2)} = \text{(#3)}$$

4 How many sales conversations per week?

Divide total number of sales conversations by 12, since there are 12 weeks in the next 90 days.

$$\text{(#3)} \div 12 = \text{(#4)}$$

5 How many sales conversations per month?

Divide total number of sales conversations by 3, since there are 3 months in the next 90 days.

$$\text{(#3)} \div 3 = \text{(#5)}$$

## SALES PLAN: HOW MANY PEOPLE DO YOU NEED TO ASK IN ORDER TO GET THOSE SALES CONVERSATIONS? FOR SERVICE PROVIDERS

This part can feel daunting. If it makes it simpler, just pay attention to the # of sales conversations you need.

**6** What is your ask rate?

One out of every **#6** people who you ask actually SHOWS UP to do a sales conversation with you (If you don't know, use 1 out of 3).

**7** How many people do you need to ask to do a sales conversation?

Multiply the number of sales conversations you need to hit your client goal (#3) by your ask rate (#6). If your ask rate is 1 out of 3, then multiply by 3.

$$\#3 \times \#6 = \#7$$

**8** How many asks per week?

Divide the number of people you need to ask by 12, since there are 12 weeks in the next 90 days.

$$\#7 \div 12 = \#8$$

## SALES PLAN: HOW MANY SALES CONVERSATIONS DO YOU NEED? FOR GENERAL BUSINESSES

- 1 How many offerings do you want to sell in the next 90 days? (#1)
- 2 What is your conversion rate?  
One out of every (#2) people says yes to working with you. (If you don't know, use 1 out of 3).
- 3 How many sales conversations do you need to have?  
Multiply the number of offerings you want (#1) by the number of people you need to do sales conversations with to so that ONE says yes to buying from you (#2). (If you don't know, use 1 out of 3)  
(#1) × (#2) = (#3)
- 4 How many sales conversations per week?  
Divide total number of sales conversations by 12, since there are 12 weeks in the next 90 days.  
(#3) ÷ 12 = (#4)
- 5 How many sales conversations per month?  
Divide total number of sales conversations by 3, since there are 3 months in the next 90 days.  
(#3) ÷ 3 = (#5)

## SALES PLAN: HOW MANY PEOPLE DO YOU NEED TO ASK IN ORDER TO GET THOSE SALES CONVERSATIONS? FOR GENERAL BUSINESSES

This part can feel daunting. If it makes it simpler, just pay attention to the # of sales conversations you need.

### 6 What is your ask rate?

One out of every  people who you ask actually SHOWS UP to do a sales conversation with you (If you don't know, use 1 out of 3).

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$$\text{#3} \times \text{#6} = \text{#7}$$

### 8 How many asks per week?

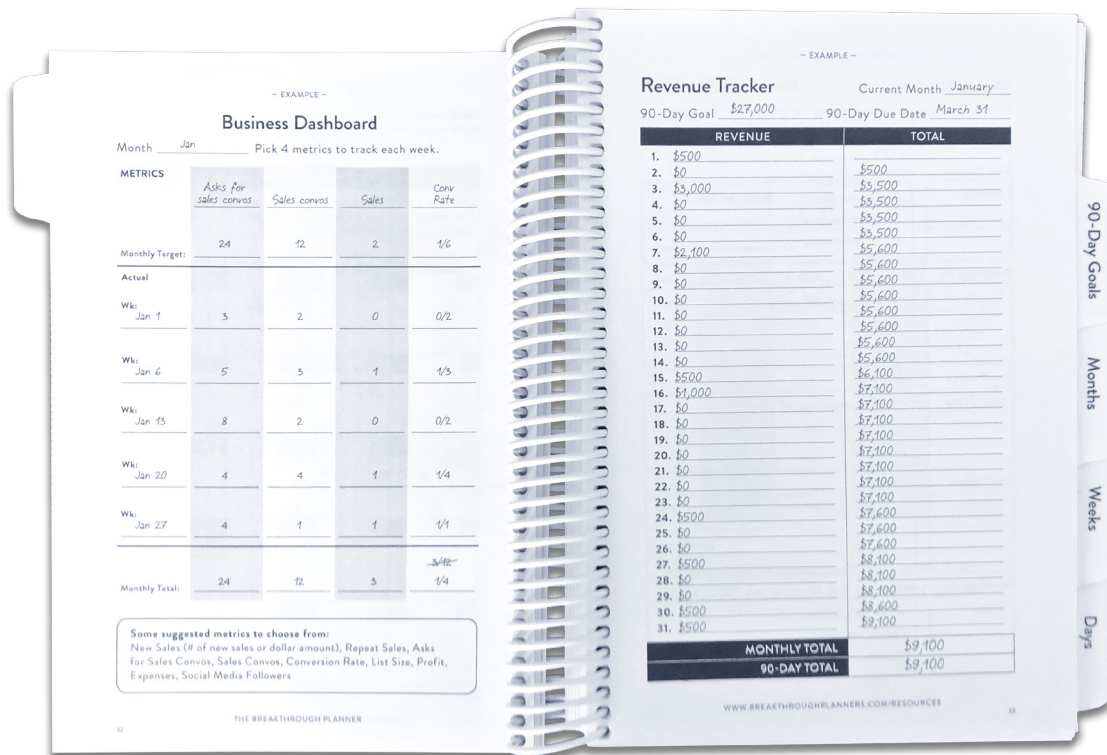
Divide the number of people you need to ask by 12, since there are 12 weeks in the next 90 days.

$$\text{#7} \div 12 = \text{#8}$$

Monica Shah's  
**REVENUE  
 BREAKTHROUGH**  
 PASSIONATE IDEAS. POWERFUL PLANNING.

**WRITE YOUR SALES NUMBERS IN  
 THE BREAKTHROUGH PLANNER**

**USE THE BIZ DASHBOARD**



**WWW.BREAKTHROUGHPLANNERS.COM**

# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 8: Create Your Sales Plan**

# SALES PLAN FOR JANUARY – MARCH 2025

Client Goal

Total Asks Needed

Asks Per Week

Asks Per Day

Total Sales Conversations Needed

Sales Conversations Per Week

Sales Conversations Per Month

**STEP 9:**  
**Create Your Marketing Plan**  
**SHIFT YOUR MIND**  
**& YOUR HABITS**

# MARKETING MOMENTUM

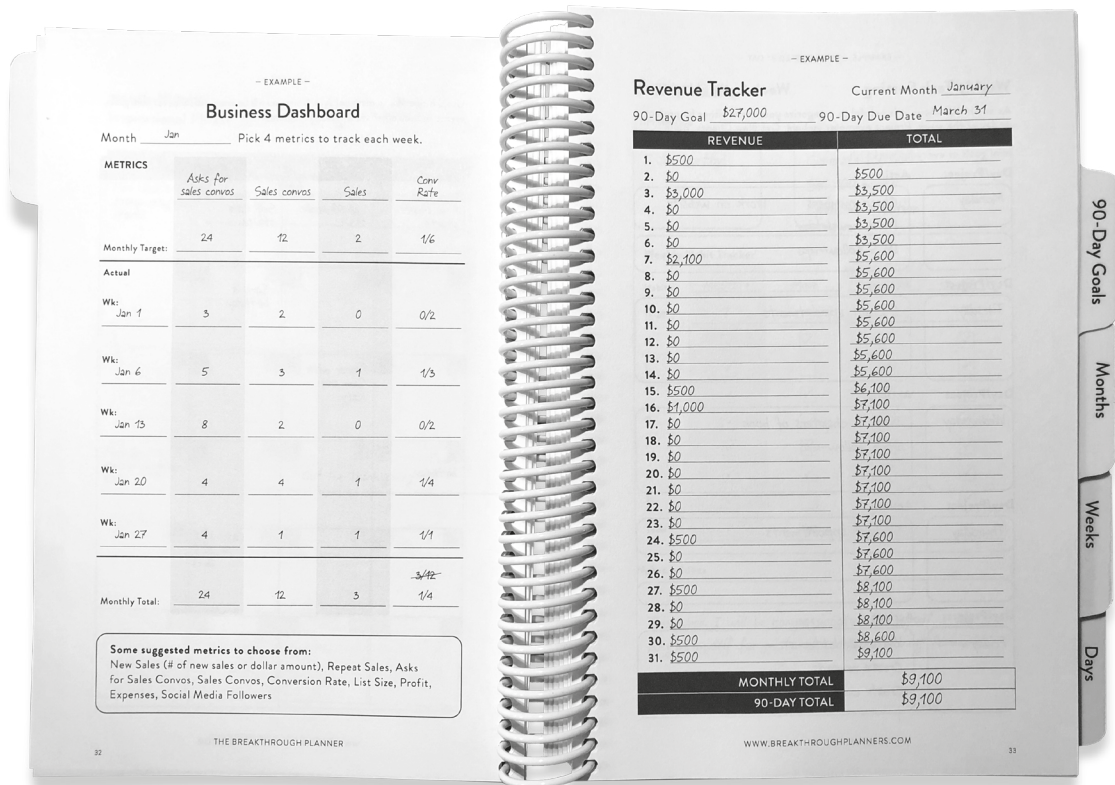
- Marketing momentum is not direct. It is quite indirect!
- Marketing seeds may take 3-6 months to sprout—don't stop before you see the leaves.
- Just keep going...



Monica Shah's  
**REVENUE  
 BREAKTHROUGH**  
 PASSIONATE IDEAS. POWERFUL PLANNING.

# REVENUE TRACKING SHEET

- Create a Revenue Tracking Sheet every 30 days
- Commit to Tracking for 2 cycles of 90 days which amounts to 6 months to really see it work!
- Watch your money grow!



[www.BreakthroughPlanners.com](http://www.BreakthroughPlanners.com)

# REVENUE TRACKING SHEET

**Inspirational phrase:**

**Money goal and completion date:**

**Old money goal and date:**

Daily tracking:	
01 .....	17 .....
02 .....	18 .....
03 .....	19 .....
04 .....	20 .....
05 .....	21 .....
06 .....	22 .....
07 .....	23 .....
08 .....	24 .....
09 .....	25 .....
10 .....	26 .....
11 .....	27 .....
12 .....	28 .....
13 .....	29 .....
14 .....	30 .....
15 .....	31 .....
16 .....	.....

*Monica Shah's*  
**REVENUE  
 BREAKTHROUGH**  
 PASSIONATE IDEAS. POWERFUL PLANNING.

# USE YOUR PROCESSING STYLE

Learning Style	Enjoyable Activities	Materials	Strategies	Presentation Style
Verbal/Linguistic	Lectures, discussions, word games, storytelling, choral reading	Books, audio books, podcasts	Read about it, write about it, talk about it, listen to it	Teaching through storytelling and step by step processes
Visual/Spatial	Visual presentations, art activities, imagination games, mind-mapping, metaphors, visualization, journal writing, drawing	Graphs, maps, video, art materials, optical illusions, cameras, picture libraries, collages, drawings, post-its	See it, draw it, visualize it, color it, mind-map it, write it out, post-it note brainstorm, collage about it, color it	Drawing, mind-mapping concepts, creating diagrams, showing pictures
Bodily/Kinesthetic	Body movements, tactile activities, dance, sports that teach, relaxation activities, meditation	Building tools, clay, post-it notes, art materials, visual displays that you create, music	Build it, act it out, touch it, dance it, get a "gut feeling" of it, move with it, meditate on it, walk around, sit in a rocker	Uses gestures and dramatic expressions, charades and movement
Auditory/Listening	Lectures, discussions, listening, processing over a time period	Recordings, books, audio books, lectures, listening and writing	Read about it, write about it, talk about it, listen to it, teach it	Talk about it and teach concepts

## BRITTA IS HAVING HER HIGHEST GROSSING YEAR YET!

Just ran my Q3 numbers and annual revenue thus far, and I've reached my income goal this year already with one quarter still to go! So grateful to Monica for teaching me how to track my revenue, make bold asks, keep pushing myself beyond where I thought I could go, and keep on keepin' on even in the midst of a chaotic societal rollercoaster! I'm amazed to report that it will be my highest grossing year yet.



**Britta Gudmunson**  
Voice, Visibility and Leadership Mentor

# Top 6 Ways to Get Visible & Make Money

# TOP WAYS TO GET VISIBLE +GET SALES CONVOS

- Speaking Events
- Sponsorships
- Hosting Mini-Workshops
- The Ask Email
- Webinars
- Referral Partners



These are Revenue  
Generating Activities

# TOP 6 WAYS TO GET VISIBLE & MAKE MONEY



## 1. SPEAKING EVENTS

- Making it Work:
  - ✓ Perfect for a MEGA ask
  - ✓ Use an organization that has an established list
  - ✓ Help the org with the marketing
  - ✓ Small groups are as helpful as bigger groups
  - ✓ Be engaging—improv, storytelling, practice!



## 2. SPONSORSHIPS

- Making it Work:
  - ✓ Perfect for a MEGA ask
  - ✓ This is a long-term relationship-building strategy—though it can be short-term
  - ✓ Requires a bit of risk up front in terms of investment
  - ✓ Follow-up is key here

# TOP 6 WAYS TO GET VISIBLE & MAKE MONEY



## 3. HOSTING MINI-WORKSHOPS

- Making it Work:
  - ✓ Perfect for a MEGA ask
  - ✓ Formal/Informal—Do what works for you
  - ✓ Let your friends help
  - ✓ 4-6 people is a good start
  - ✓ Partner with others to create your own event



## 4. THE ASK EMAIL

- Making it Work:
  - ✓ Email your list 3 times—2-3 days apart
  - ✓ Stories work well here
  - ✓ Ask for conversations or meetings
  - ✓ Great for marketing research
  - ✓ Excellent for creating partnerships or new opportunities
  - ✓ Perfect for a MEGA ask

# TOP 6 WAYS TO GET VISIBLE & MAKE MONEY



## 5. WEBINARS

- Making it Work:
  - ✓ Great place for experimentation
  - ✓ Practice makes perfect
  - ✓ Numbers are important
  - ✓ Be patient with your growth
  - ✓ Perfect for a MEGA ask
  - ✓ \*\*\*\* be patient as these are limited by your list size and reach



## YOU NEED A LIST OF SUBSCRIBERS TO FILL YOUR WEBINARS

- Making it Work:
  - ✓ Start building your online list now
  - ✓ It's a marathon—not a sprint
  - ✓ Create a few free gifts and add people to your list with them

# TOP 6 WAYS TO GET VISIBLE & MAKE MONEY



## 6. REFERRAL PARTNERS

- Making it Work:
  - ✓ Remember that you have to find the gold nugget
  - ✓ Be clear about going into meetings with ideas and coming out of meetings with concrete plans and next steps
  - ✓ Don't be afraid to show your knowledge and assertiveness (you'll be appreciated)

## TONYA HAD HER BEST MONTH EVER!

Best month ever! We have hit our highest numbers in business so far and we have 3 more sales pending next week to close out the month! I am better for being in RISE and for learning new skills to take my business to higher levels!

**Tonya Butler**  
**Medical Massage Therapist**



# YOUR LAST FIVE CLIENTS

Write down the names of your last 5-10 clients—then write down where/how you met them for the **FIRST** time

01	.....
02	.....
03	.....
04	.....
05	.....
06	.....
07	.....
08	.....
09	.....
10	.....

# SAMPLE VISIBILITY PLAN

- 4: newsletters/blog posts a month
- 3: sales conversations (3 times a week) ASK FOR MONEY
- 3: speaking events (3 per month if you are ramping up, 1 if in maintenance—can include mini-workshops)
- 2: connecting convos (2 times a week – could be networking)  
–This can be stopped as you get more advanced
- 1: conversation with referral partner (1 time a week)
- 1: webinar (1 per quarter)
- 1: sponsorship (1 per quarter)
- 1: ask email series (2-4 times a year)

## GAYLE USES A CUSTOM “CORPORATE” PLAN (ACHIEVER)

Since working with Monica, I have packaged and proposed the program I developed for a large Fortune 500 company and proposed it to other companies without hesitation. Working the plan I developed with Monica, I will easily cross the 6 figure mark in less than a year in business. Monica has helped me build the confidence I needed to take the BIG steps forward.



**Gayle Hilgendorf**

### GAYLE’S PLAN – CORPORATE PLAN

Quantity	Period	Marketing Activity
15	week	asks/connections
3	month	meetings
2	month	corporate webinars

## MARCIA'S PLAN LETS HER LEAVE HER HOME (FREEDOM-SEEKER)

Working with Monica changed my life. For the first time in YEARS, I am not worried about money. I have systems in place to keep the income flowing, and I know exactly what to do when something doesn't go as planned. Most importantly, I get to do what I truly love: helping people have uncommonly excellent relationships. The Revenue Breakthrough program was truly a revelation. I cannot recommend it highly enough.



**Marcia Baczynski**

### MARCIA'S PLAN – HATED BEING BEHIND THE COMPUTER

Quantity	Period	Marketing Activity
7	week	posts on social media
2	month	speaking events
1	month	women's circle

## SARAH DEW IS A BUSY MOM (NURTURER)

Before working with Monica, I was in the wrong business going in the wrong direction and stressed out all the time. Now, I know how to focus on exactly what needs to be done. I went from 0-6 figures working 20 hours a week, have made changes to all areas of my life, and I am stepping into what I always knew I was capable of.



**Sarah Dew**

### SARAH'S PLAN- LESSENERED THE LOAD IN THE SUMMER

Quantity	Period	Marketing Activity
7	week	social media posts
4	month	blog posts
3	week	sales conversations
2	week	conversation with JV partners
1	quarter	webinar

# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 9: Create Your Marketing Plan**



# DAY 3: GROW IT

# SALES IS THE ENGINE THAT MOVES YOUR PLAN FORWARD

- Marketing is only 50% of the picture – the other half is ASKING for money.
- How many times did you ask for money this week?

## NEW BELIEFS – SALES REFRESHER

- “They are rejecting the offer – not me.”
- “There is more than enough to go around.”
- “I can learn to be an amazing salesperson.”
- “If I TELL THEM about it – then they will come.”
- “My business will grow when I spend time learning how to master business skills along with my trade.”
- “I can be truthful and still make tons of money.”
- “There are 30,000 other people behind this person who want to buy from me.”
- “My services can and will change lives and are worth every dollar.”

# THE SWISS CHEESE METHOD OF SELLING

Marketing is only 50% of the picture – the other half is ASKING for money.  
**How many times did you ask for money this week?**

## USE THE SWISS CHEESE MODEL OF SALES

- Listen for the holes.
  - “What do you want to achieve?”
  - “Where are you now?”
  - “What challenges have you had along the way?”
- Pick one hole to fill – ONE only. Fill it.
- Offer your programs to help fill the rest of the holes.
- Not pushy – just helpful and clear.

## PART ONE – STATUS NOW

- Small talk – Where are you from? How did you find out about us?
- We are here to chat about you – and to support you in your X
- Where are you now?
- What is your business/life/health like right now?
- Ask enough questions until you get a full picture of where they are now.
- Don't get into stories.

## PART TWO – WHERE DO YOU WANT TO GO?

- Where do you want your business / life / health to go in the next 6 to 12 months?

## PART THREE – WHERE IS THE GAP?

- What are the obstacles/challenges / issues that are keeping you from where you want to go?

## PART FOUR – FILL ONE HOLE

- Consult with them on one particular area.
- Don't fill all the holes!

## PART FIVE – INSPIRATION

- What would your life look like with your problems solved?
- What would you be able to be/do/have if you hit your goals?

## PART SIX – INVITE THEM TO BUY YOUR OFFERINGS

- Would you like to hear more about my products/programs/services and how they work?

## PART SEVEN – WORK THROUGH OBJECTIONS

- “ I don't have enough money.”
- “ I don't have enough time.”
- “ Let me think about it.”
- “ Let me speak to my partner.”

# SALES STYLES

## THE INTERVIEWER

- Show me why you deserve to work with me

## THE INTUITIVE

- Let me show you the real issue

## THE MUSE

- Let me show you the possibility

## THE DIGGER

- Keep going until we get to a yes

## CHERYL LOVES SALES CONVERSATIONS

“I’ve come out of hiding. Sales conversations no longer scare me. I love connecting with other business owners. And I now have an entire network I can call on when I need a pick-me-up, some butt-kicking, or a celebration.



I’ve also taken control of my time. Before RISE, I was working like a mad woman (even pulled some all-nighters). Now, I have a plan and a schedule that allows for free time and self-care.”

**Cheryl Binnie**  
**Copywriter**

## JULIA IS MAKING HER DREAMS COME TRUE

Before working with Monica I did everything backwards. I love the comprehensive level of material covered in RISE – no more guesswork or trying to figure things out on my own. Within a few months, I looked at my numbers (using her tracking system) and realized that my dream was actually coming true and I was making money attracting the clients I love to work with. I'm learning from a Master Coach who walks her talk.



**Julia Katsivo**  
**Holistic Business Coach**

# **STEP 10: Create Your Monthly Schedule**

# TIPS FOR PLANNING STYLES



## **NURTURERS:**

- Take summer, holiday and vacations off – plan more in the spring and fall.



## **ACHIEVERS:**

- What help can you get to achieve your goals?



## **WORLD-CHANGERS:**

- What do you need to do now to be able to grow your platform? Think in layers.



## **FREEDOM-SEEKERS:**

- Take the time off that you need in your years, months, weeks and days.

## AVIVA'S REVENUE IS UP 130%!

Last week, I had a quarterly meeting with my CPA, to go over my numbers. I was a little bummed because my monthly revenue was inconsistent. She then pointed out that my revenue from January to June of this year was up 130% from the same period last year! Can you guess when I joined the RISE Business Academy?

**Aviva Black**  
**Founder of Family Love Letters**



## REVENUE BREAKTHROUGH MONTHLY SCHEDULING CHECKLIST

- Plan out your vacations and time-off
- Plan out family time
- Plan live team retreats (if applicable)
- Plan in client live events (if applicable)
- Plan in other business events (if applicable)
- Plan in 1-3 launches over the course of the year (if applicable)
- Plan 1-4 list building events (if you intend to grow your business online)
- Plan your sponsorships and speaking events that require travel
- Plan your days off during each quarter

# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 10: Create Your Monthly Schedule**

# CREATE YOUR MONTHLY SCHEDULE 2025: FIRST SIX MONTHS

JANUARY 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

FEBRUARY 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

MARCH 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

APRIL 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

MAY 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

JUNE 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

# MONTHLY PLAN 2025 NOTES

Plan: Vacations, Time Off, Family Needs, High and Low Income Months, Business Travel, Re-Charge Days, List-Building Initiatives, Events and Launches

# CREATE YOUR MONTHLY SCHEDULE 2025: SECOND SIX MONTHS

JULY 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

AUGUST 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

SEPTEMBER 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

OCTOBER 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

NOVEMBER 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

DECEMBER 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

# MONTHLY PLAN 2025 NOTES

Plan: Vacations, Time Off, Family Needs, High and Low Income Months, Business Travel, Re-Charge Days, List-Building Initiatives, Events and Launches

# JANE HAS BUILT A FLOURISHING BUSINESS!

RISE taught me how to create a profitable business that aligns with my vision and mission to build a better life. I learned how to change my money mindset and create my new money voice to engage more clients.

**Dr. Jane Huei Chen Cheng**  
**Business and Life Coach**



# STEP 11: Create Your Quarterly Goals

# QUARTERLY GOALS

- **Goal 1:** Revenue Goal, how much money do you want to make over the next 90 days?
- **Goal 2 & Goal 3:** Project Goals

## EXAMPLES OF QUARTERLY PROJECT GOALS (NOT EXHAUSTIVE):

- Create template and start sending newsletter
- Write and set up free report
- Hire a new executive assistant
- Find a new bookkeeper and accountant
- Organize office space
- Update all systems and processes
- Re-brand and re-write website
- Re-record all audios on current product
- Create a new info-product

# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 11: Create Your Quarterly Goals**

# STEP 11: CREATE YOUR QUARTERLY PLAN

JANUARY 2025	FEBRUARY 2025	MARCH 2025

QUARTERLY GOAL 1: \_\_\_\_\_  
QUARTERLY GOAL 2: \_\_\_\_\_  
QUARTERLY GOAL 3: \_\_\_\_\_

APRIL 2025	MAY 2025	JUNE 2025

QUARTERLY GOAL 1: \_\_\_\_\_  
QUARTERLY GOAL 2: \_\_\_\_\_  
QUARTERLY GOAL 3: \_\_\_\_\_

# STEP 11: CREATE YOUR QUARTERLY PLAN

**JULY 2025**



**AUGUST 2025**



**SEPTEMBER 2025**



QUARTERLY GOAL 1: .....

QUARTERLY GOAL 2: .....

QUARTERLY GOAL 3: .....

**OCTOBER 2025**



**NOVEMBER 2025**



**DECEMBER 2025**



QUARTERLY GOAL 1: .....

QUARTERLY GOAL 2: .....

QUARTERLY GOAL 3: .....

## TRISH CLOSED 2 PRIVATE CLIENTS IN 2 DAYS!

I have closed two clients in two days! I am a little in shock— Lesson? Work Monica's RISE Business Academy and listen to your coaches and it can happen. My goal for Jan and Feb was two private clients and I've now closed four!

**Trish Perry**  
**Founder of Harmonize Coaching**



# STEP 12: Create Your Weekly Plan

# WEEKLY PLANNING

## PLANNING TIME

- Take some time to look at the week and see what is coming
- Create your lists for that week:
  - People to talk to
  - Things to do
  - Discussions for team members
  - Incomplete items on the calendar
- Use Breakthrough Planner to plan days and weeks—  
[www.BreakthroughPlanners.com](http://www.BreakthroughPlanners.com)



## MONEY MONDAY

- Money Monday – when you do your marketing checklist:
  - Write newsletter
  - Follow-up and book sales conversations
  - Find and book networking meetings
  - Find and book speaking events
  - Find and book meetings with referral partners
  - Find and book meetings with JV Partners (to support webinars)

## HELEN HAS MET HER COMMUNITY IN RISE

Since joining RISE, I have met so many amazing entrepreneurs from all over the country that would never have crossed my path otherwise. RISE has positioned me with so many skills and systems that I can put into action.

**Helen Panos**  
**Professional Speaker, Tutor and Educator**



# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 12: Create Your Weekly Plan**

# CREATE YOUR WEEKLY PLAN

**MONDAY**

**TUESDAY**

**WEDNESDAY**

# WEEKLY PLAN

**THURSDAY**

**FRIDAY**

# RISE HAS GIVEN BONITA THE STRUCTURE TO BE SUCCESSFUL

RISE is the most well thought out program that I've ever encountered and is structured for its participant's success! Monica has thought of everything and has given me the tools to be intentional about my business.

**Bonita Owens**  
**Leadership Coach/Consultant**



# STEP 13: Create Your Daily Plan

# DAILY PLANNING

## THE MYTH OF TIME MANAGEMENT

- You will never get it all done
- Pick the three activities that get you closest to your goals – work on them first

## CLOCK WATCHING

- Most tasks should take less than an hour!

## MANAGING EMAIL + SOCIAL MEDIA

- Use a timer in blocks of 15 minutes
- Check twice a day
- Emails are NOT conversations – pick up the phone where necessary



# DAILY PLANNING

## TIME BLOCKING

- Like activities go together
- Example Activities:
  - Check email and social media
  - Client Time
  - Teaching Time
  - Project Time
  - Sales Conversations
  - Personal Time
- Use Monica's Flow Method to get work done twice as fast.  
 Check out the Flow Method at: [www.FlowMethodProgram.com](http://www.FlowMethodProgram.com)

# DAILY PLANNING

## THE GODDESS AND THE WARRIOR



**GODDESS TIME—  
MORNING RITUAL**

**MY WALK,  
MY MEDITATION,  
SITTING IN STILLNESS—  
TOUCHING THE LIGHT**

**WARRIOR TIME—  
WORK DAY**



**DOING THE WORK  
IN ALIGNMENT WITH  
MY BOUNDARIES  
TO MAKE MY DREAM  
A REALITY**

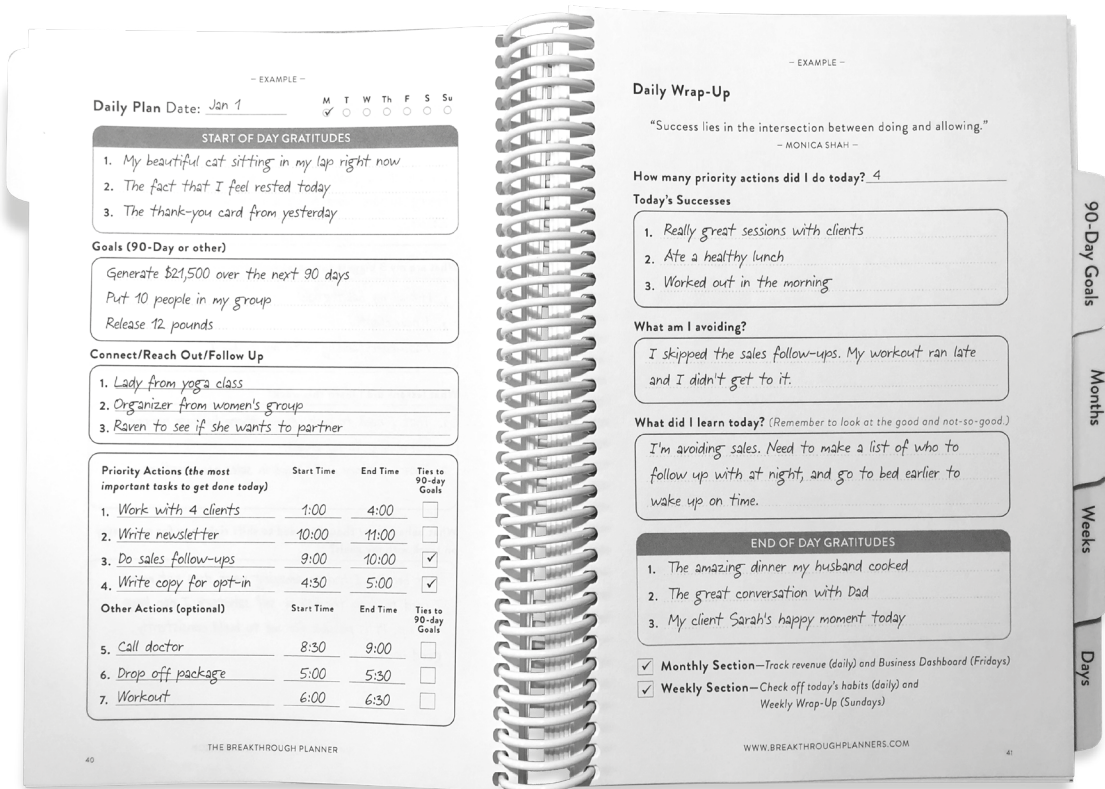


**GODDESS TIME—  
END OF DAY RITUAL**

**MY MEDITATION,  
MY JOURNALING,  
TIME WITH FAMILY—  
TOUCHING THE LIGHT**

Monica Shah's  
**REVENUE  
 BREAKTHROUGH**  
 PASSIONATE IDEAS. POWERFUL PLANNING.

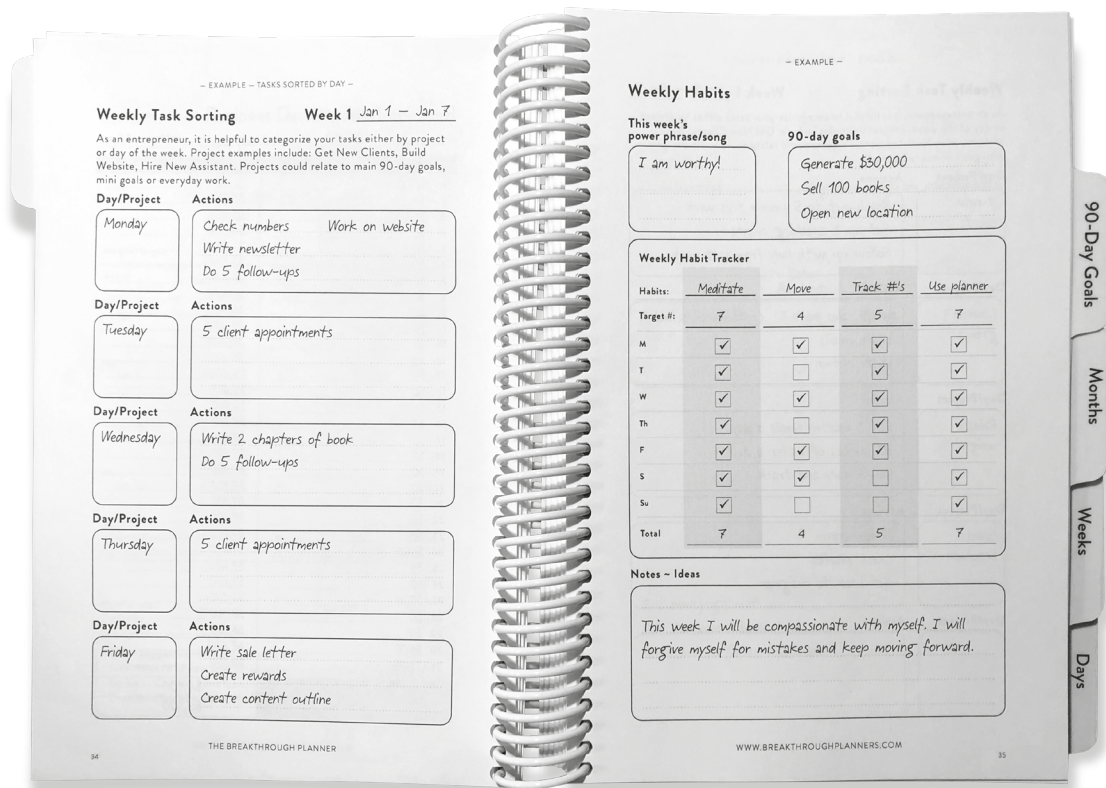
# DAILY PLANNING IN THE BREAKTHROUGH PLANNER



[www.BreakthroughPlanners.com](http://www.BreakthroughPlanners.com)

Monica Shah's  
**REVENUE  
 BREAKTHROUGH**  
 PASSIONATE IDEAS. POWERFUL PLANNING.

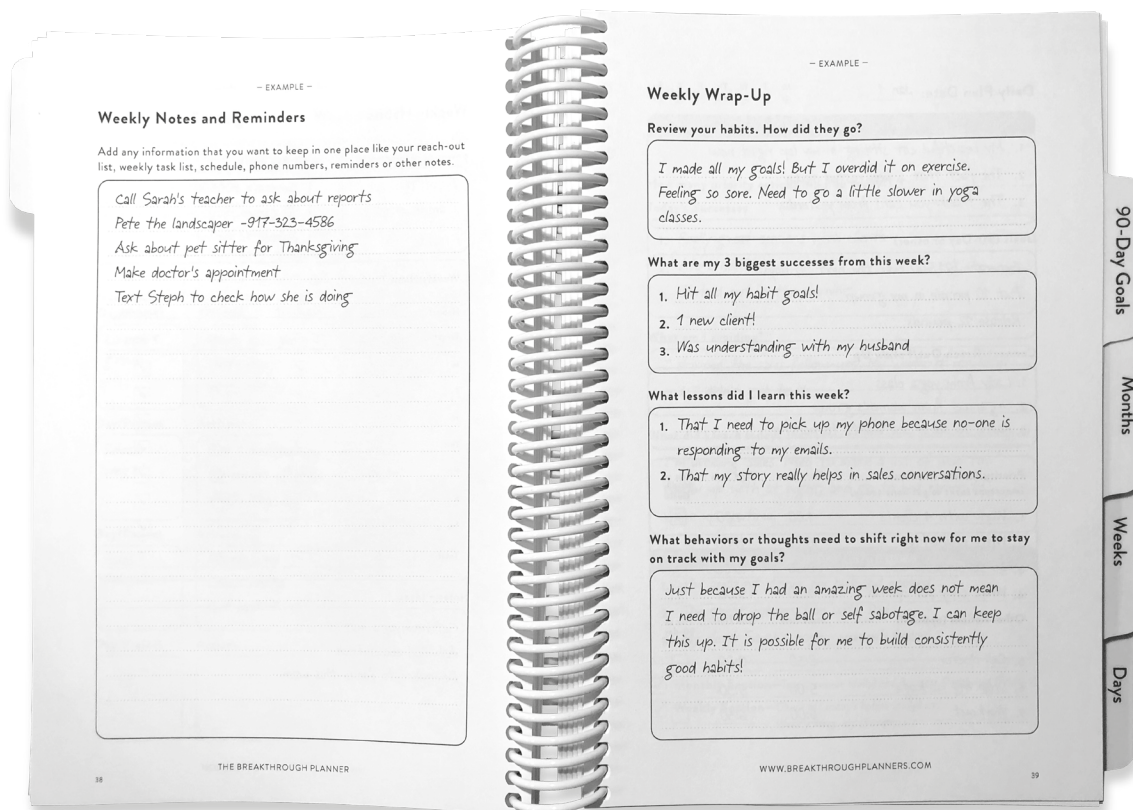
# WEEKLY PLANNING WITH THE BREAKTHROUGH PLANNER



[www.BreakthroughPlanners.com](http://www.BreakthroughPlanners.com)

Monica Shah's  
**REVENUE  
BREAKTHROUGH**  
PASSIONATE IDEAS. POWERFUL PLANNING.

# WEEKLY PLANNING WITH THE BREAKTHROUGH PLANNER



[www.BreakthroughPlanners.com](http://www.BreakthroughPlanners.com)

## AI GOT HER FIRST PRIVATE CLIENT!

I just got my first private client! I did my first sales conversation last week, which I didn't think went that well but it worked somehow! He came from one of the RISE Reachout challenges I did in July. So thankful for Monica pushing us to reach out.

**Ai Kubo**  
**Yoga Instructor & Wellness Coach**



# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

## **STEP 13: Create Your Daily Plan**

# CREATE YOUR DAILY PLAN

## MORNING GODDESS TIME

What is your ideal morning ritual?

Work day starts at:

## WORK DAY - WARRIOR TIME

## EVENING GODDESS TIME

Work day ends at:

What is your ideal end of work day ritual?

# **YOUR CERTIFIED REVENUE BREAKTHROUGH PLAN**

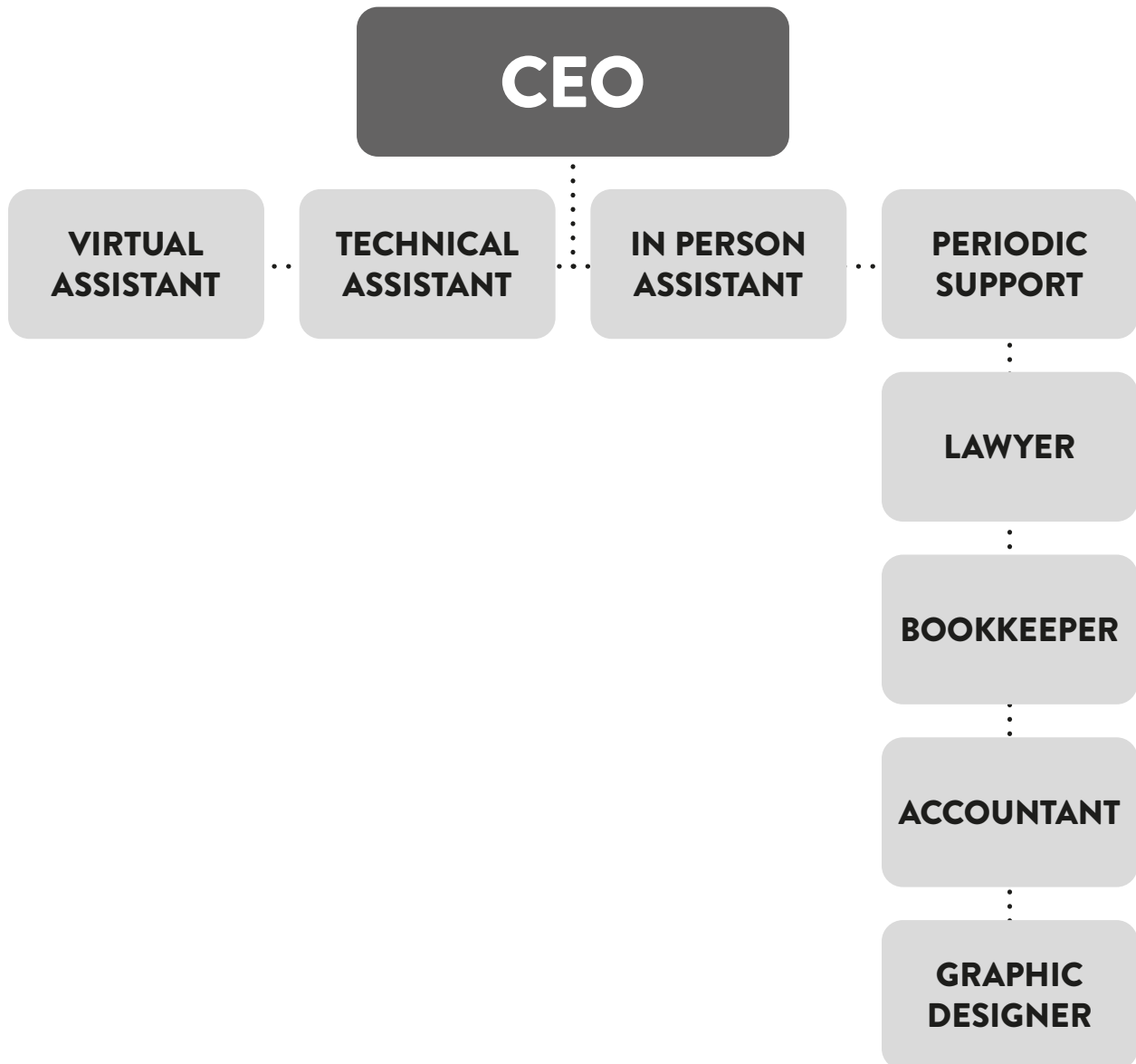
## **STEP 14: Create Your Support Plan**

## CORE SUPPORT PLAN

What is your support plan? Fill in the blanks with what you have now and what you intend to start creating next week:

<p><b>ACCOUNTABILITY PARTNERS</b></p> <p>Now:</p>    <p>Next week I will start creating:</p>	<p><b>MINDSET SUPPORT</b></p> <p>Now:</p>    <p>Next week I will start creating:</p>
<p><b>LIFESTYLE SUPPORT</b></p> <p>Now:</p>    <p>Next week I will start creating:</p>	<p><b>BUSINESS COACH/MENTOR</b></p> <p>Now:</p>    <p>Next week I will start creating:</p>

# CREATE YOUR SUPPORT PLAN



# SUPPORT PLAN

What does your team look like now?

# SUPPORT PLAN

Create what you'd like your team to look like in 12-24 months

## YOUR FABULOUS FIVE

Write down the names and phone numbers of five entrepreneurs in your life that you could call day or night if you needed support:

01:

02:

03:

04:

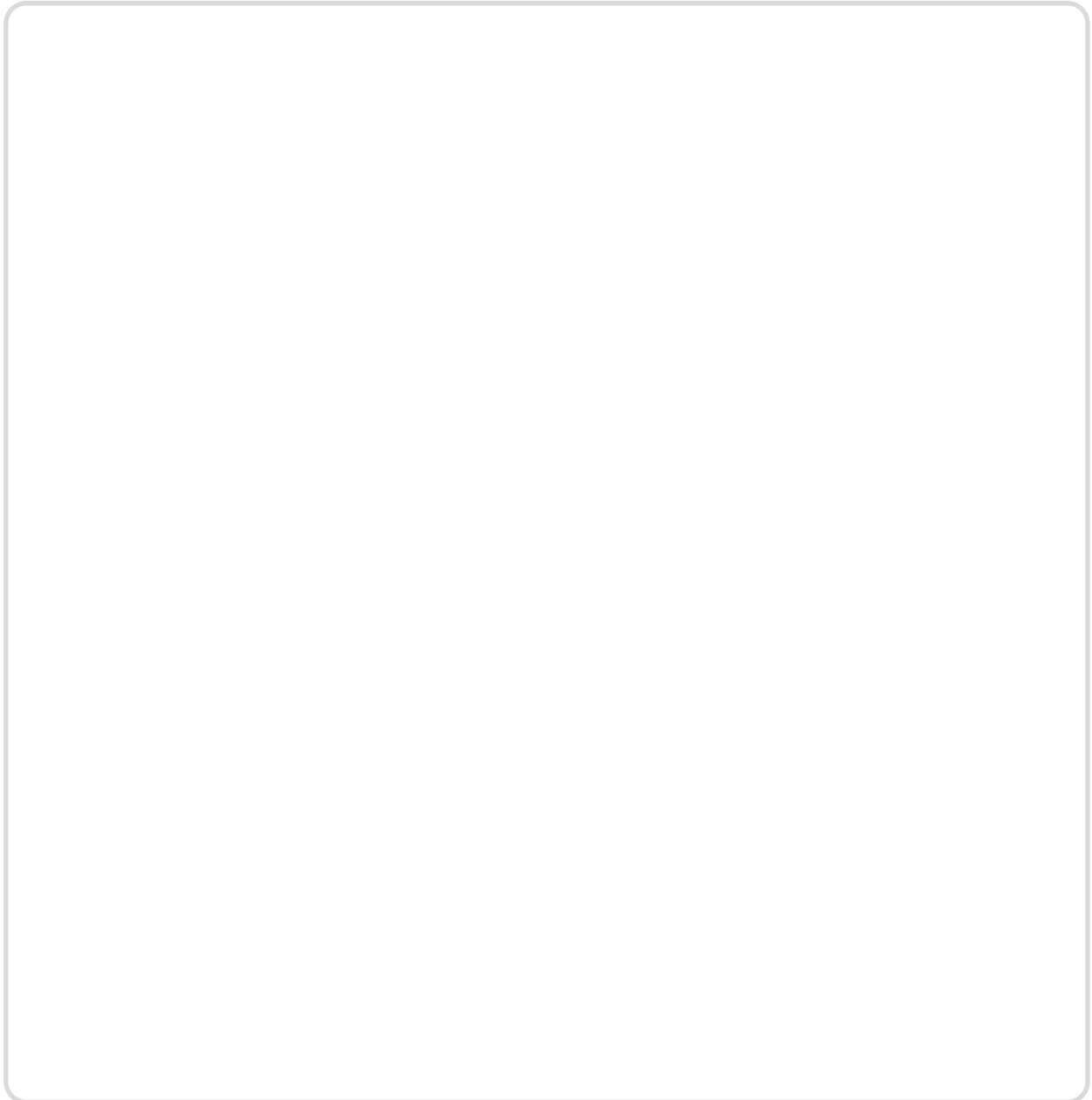
05:

“One of my best moves is to surround myself with friends who, instead of asking, “Why?” are quick to say, “Why not?” That attitude is contagious.”

– Oprah Winfrey

## YOUR LETTER

Write a letter to you now from the perspective of your 86-year-old self.  
What advice would you give yourself?



## REVIEWING THE PLAN

- ✓ The plan is dynamic – not static.
- ✓ Review it once a week for specific actions.
- ✓ Use the Breakthrough Planner to do daily, weekly, quarterly planning  
[www.BreakthroughPlanners.com](http://www.BreakthroughPlanners.com)
- ✓ Review it once a quarter for editing and global changes – especially around numbers.
- ✓ Spend 3-5 days each year creating next year's ideas and the plan that goes with it.
- ✓ Use the Flow Method program to get work done faster  
[www.FlowMethodProgram.com](http://www.FlowMethodProgram.com)

## 20 MINUTE WEEKLY CHECK-INS

- **Plan (5 minutes)**
  - What are my quarterly goals? How am I doing?
  - What do I need to do this week to get me closer to them?
- **Money (2 minutes)**
  - How much have I brought in this month, this year?
  - What do I need to do to get to my goals?
- **Mind (6 minutes – 2 each)**
  - What are 3 successes/wins that happened this week?
  - What would I do if I wasn't afraid?
  - What am I afraid of?
- **Business (3 minutes)**
  - What are my biggest problems?
  - How do I solve them?
- **Relationships (3 minutes)**
  - Who can I reach out to in order to grow my business?

# BAMBI'S MONTHLY INCOME HAS SURPASSED HER ANNUAL INCOME!

My May monthly income has surpassed my former annual income. The RISE Business Academy helped me get organized and focused on the right things, in the right order. I have more time and freedom, more money, and my ideal clients are flowing in – all with more ease and joy.

**Bambi Thompson**  
**Brain Coach**



# OUR PREFERRED PARTNERS



## You Know What You Want In Your Business (well, at least most of it 😊)

### But Do You Have the Time or Energy to Execute It?

At The Big Comeback, you've laid the groundwork—the vision, goals, and plans for the next 12 months are in place. But here's the reality: **Do you have the time, energy, or the specialized skills needed to execute every part of that vision effectively?**

*That's where we come in.*



## We Build and Manage This Powerful 3-Step Client Generating System:

- 1 **Generate Leads:** We help you create materials for high-impact lead-generating activities, including speaking events, sponsorships, and various online and offline platforms, ensuring you effectively connect with potential clients.
- 2 **Creating Assets + Systems:** We help set up your booking systems & build assets such as your free gifts & opt-in pages to make sure you generate more sales conversations + revenue.
- 3 **Nurturing + Building a Relationship with Your Leads:** We manage the creation + posting of on-going social media to create visibility and top of mind awareness for your leads—which ultimately leads to more sales conversations and more money!

At **Charmie & Cie**, our team of dedicated Marketing Virtual Assistants is more than just extra hands—we're **the competitive edge you've been searching for**. We don't just lighten your load; we partner with you to turn your vision into reality, offering you the expertise, focus, and execution necessary to push your business forward.

*Ready to level up your sales without working harder?*

Download our free report: **The Complete Delegation Guide: 25 Tasks that You Could Give to a Virtual Assistant TODAY** (and how to make sure they succeed at them).



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*Or go to:*

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# CHECKS & BALANCES

*Your Trusted Accounting Partner*

## Is Tax Season Super Stressful for You?

***You founded your business because you love the work you do...but you probably don't love the bookkeeping! Let me be your numbers expert.***

- Maybe it's because organizing your expenses is too hard or that you are often behind in inputting them.
- Maybe there's a bit of chaos in your numbers or you're a bit behind in paying your taxes (cue shame).
- Maybe you often get hit with unexpected tax bills (surprise, you now owe \$10,000 that you didn't even know about).
- Or maybe it's just that the words taxes, accountant, or bookkeeper trigger you - so you avoid the whole matter.

No matter where you are - I CAN HELP 😊

I'm focused on helping you organize your money, get your bookkeeping handled, and get those taxes done in a PEACEFUL AND MONEY-SAVING way.

If you've ever had money fears, or felt disrespected or didn't understand the language of a financial professional - I totally get it.

My highest priority is treating my clients with respect and honesty to help you understand your numbers, regardless of your financial "IQ."

Connect with me if you'd like to chat about understanding your numbers, or need help with bookkeeping or accounting.

Sign Up: <https://Cnbaccounting.as.me/chat>



**Deborah Schaub, CPA, MBA**

[cfo@deborahschaub.com](mailto:cfo@deborahschaub.com)

201.787.6542

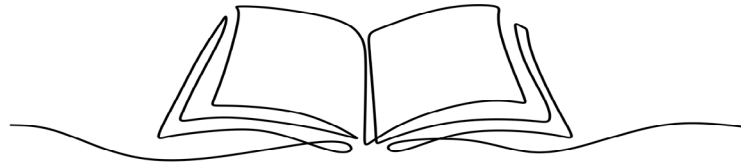
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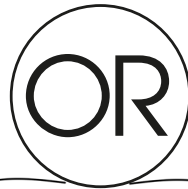
<https://cnbaccounting.com/taxsavingtips/>



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it's ALL about how well your book sells YOU!®**

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MULTI-AUTHOR COLLABORATIVE**

**BOOK**



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# The Self-Honoring Woman

Vibrant Energy. Beautiful Body.  
Powerful Living.

**Are you ready  
for all day energy &  
crystal clear thinking?**

**Then it's time to go  
deeper with Alicia.**

Clawing your way through  
fatigue and brain fog  
every day?

Struggling with chronic  
health issues that just aren't  
going away?

Constantly at war with food,  
your weight, and your body?



Alicia Morrow, Founder & Creator

**Diets, supplements, and lifestyle  
changes will only get you so far.**

Breakthroughs can happen, but they  
don't last. (And when you keep "falling  
off the wagon" or that "supplement stops  
working" you stop trusting yourself.)

To transform your body, your energy,  
your health and the way you live, you  
must look deeper.

My Self-Honoring Woman System uses  
practical health protocols & deep wisdom  
from 5 archetypes to help you reclaim  
your energy, release weight, and navigate  
chronic illness at the root level, so you  
can experience...

- ✦ All Day Energy
- ✦ Crystal Clear Thinking
- ✦ Restful Sleep
- ✦ Fit & Healthy Body
- ✦ Deeply Connected, Vibrant Living

**Ready to go from temporary breakthroughs,  
to lasting, vibrant transformation?**

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**#2: Schedule a complimentary Discovery Call at:**  
[SpeakWithAlicia.com](https://SpeakWithAlicia.com)

## It's Time For The World To Know Your Name

Could you do that through cleverly crafted organic content? Maybe, if you're feeling patient.

But **paid ads** will get you there much faster.

At **Storybird Ads**, we combine the immense power of storytelling with the science of conversion marketing

### The results?

- Up to **42x Return** On Ad Spend
- Multi-six-figure launches
- **Sold-out** recurring revenue products

**Your Story + Our Strategies =  
Profitable, Sustainable Business  
(With the team that truly cares)**

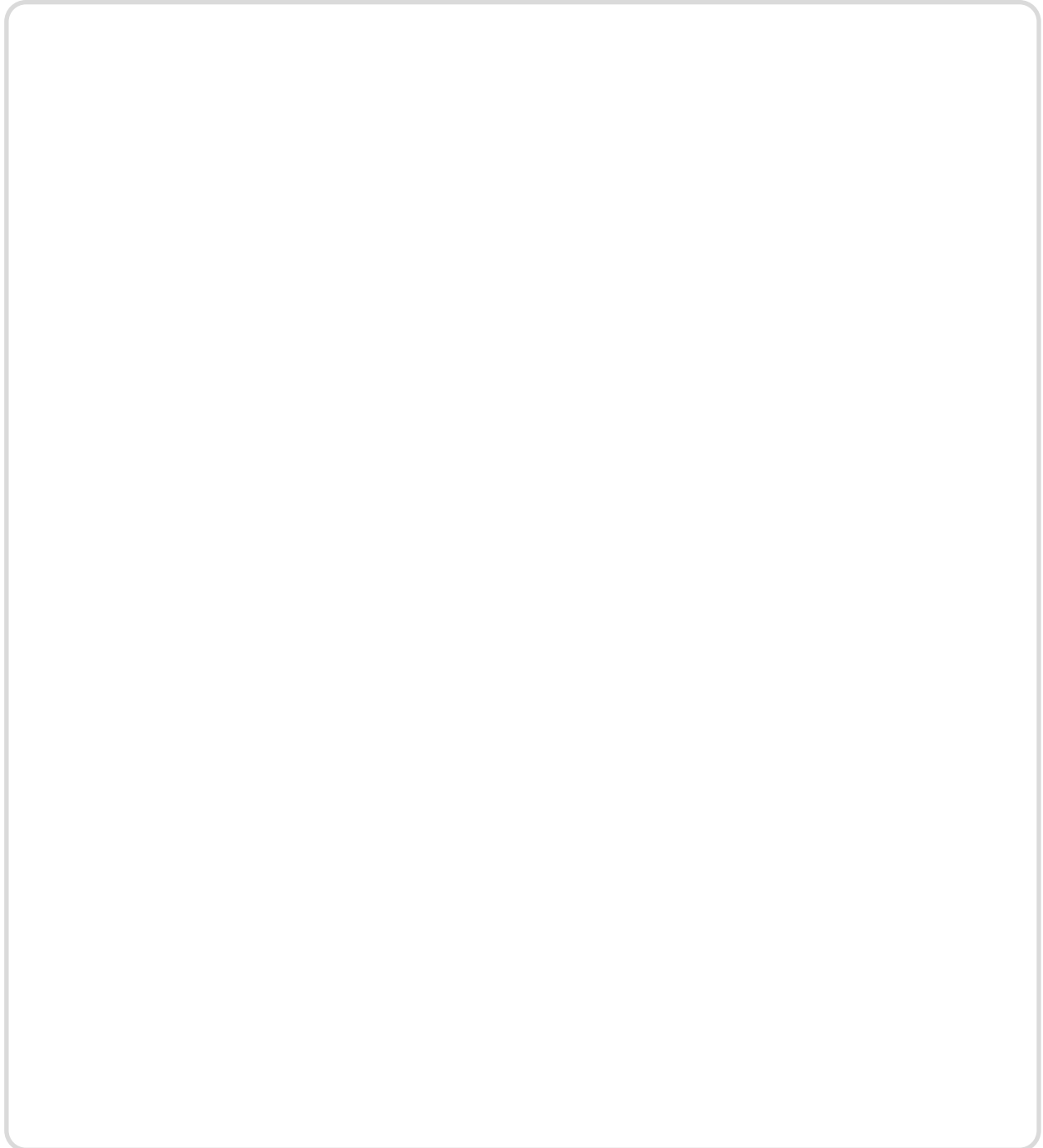
**Vidya Ravi**

CEO, Paid Traffic Strategist

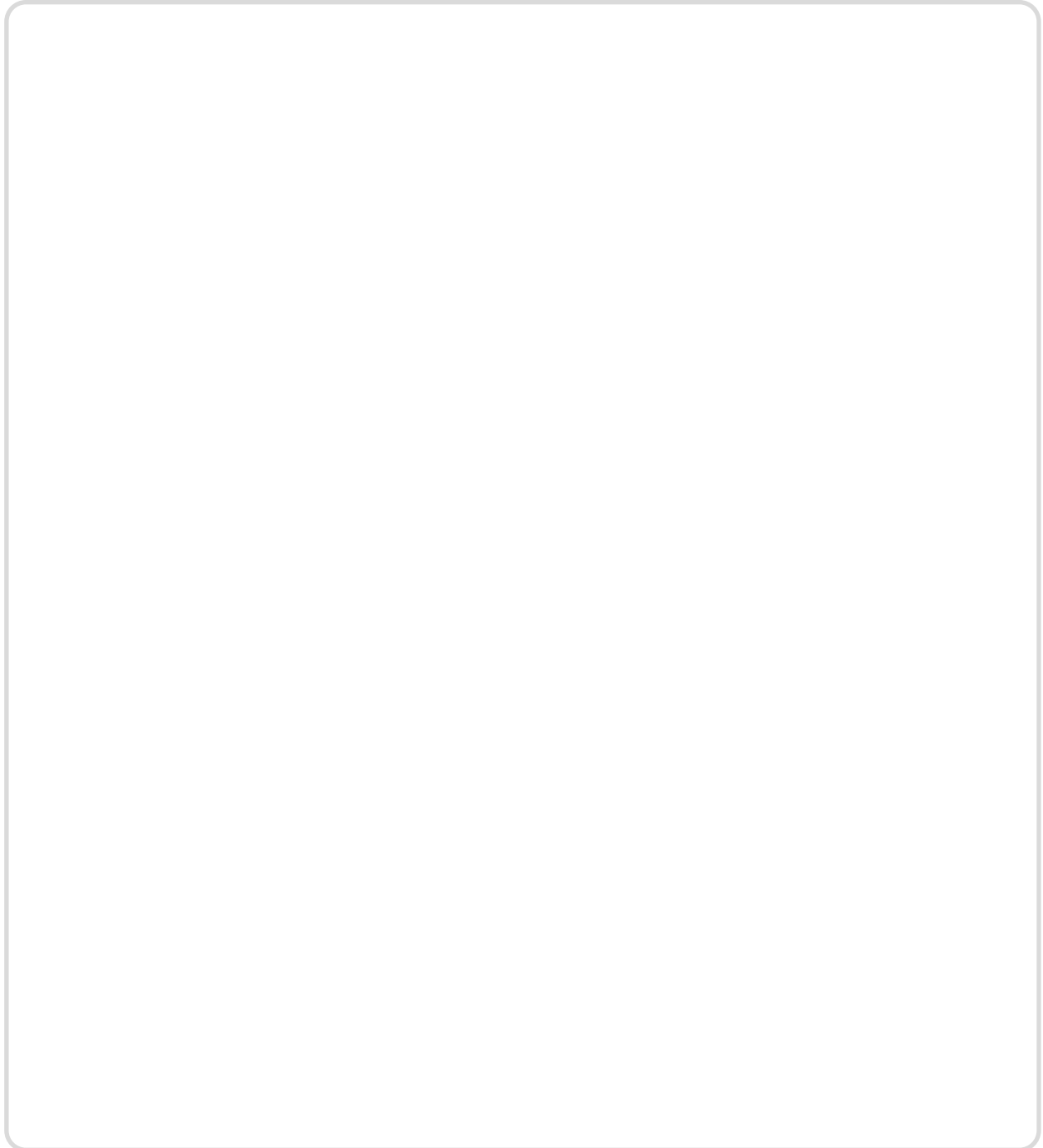


Reach out to us today at <https://vidya.as.me/call>

# NOTES



# NOTES



# START THE YEAR STRONG

*Monica Shah's*

**BIG  
COMEBACK  
EVENT**

A REVENUE BREAKTHROUGH VIRTUAL EVENT