



# PLATFORM

## DESIGN YOUR FUTURE

# The Task Timer



## The Goal

To design a life plan for both yourself and your partner to create clarity on the direction of your life together.

## Money Made or Saved

By understanding the vision of your life, you can then decide on the vision of the business and ensure that all actions in the business align with the life plan.

#RightNextThing

# Design Life Plan

## The Task

- Do online training on MyLifestyleTradie.
- Download and print a copy of the workbook for both yourself and your partner.
- Complete the Life Plan Workbook separately.
- Discuss with your partner what you have both written in your Life Plan workbook.
- Agree on your Life Plan together.

## The Time

- 1 hour
- 15 minutes
- 3+ hours
- 1+ hours
- 1-2 hours

# The Task Timer



## The Goal

To understand the difference between a growth and a fixed mindset — and why it matters in business.

## Money Made or Saved

By having the right mindset will have a profound influence on the results you are generating, both personally and in business.

#RightNextThing

Own A Success  
Mindset

## The Task

- Do online training on MyLifestyleTradie.
- Review the 11 D's of Mindset Success with consideration to how you have or should adopt this into your life.
- As you are going through the online training, make notes of what you want to implement or phrases you want to adopt (think not just in business but in your life as a whole).

## The Time

15+ hours

1 hour

# The Task Timer



## The Goal

To establish the correct business structure for your trade business.

## Money Made or Saved

By ensuring you have the correct business structure in place will protect you and your family's assets, impact on the tax you're liable to pay, legal liabilities, and set up costs.

#RightNextThing

# Confirm The Right Business Structure

## The Task

- Do online training on MyLifestyleTradie.
- Review what business structure you are currently operating under.
- Arrange a time to meet with your accountant to discuss your current business structure.
- Meet with your accountant to discuss your current business structure.
- Decide on the correct business structure.
- If required, make the necessary changes to switch business structures. (NOTE: Dependent on the accountant's advice you may wish to wait until the next financial year commences)

## The Time

2 hours

30 minutes

30 minutes

1+ hours

1+ hours

3+ hours

# The Task Timer



## The Goal

To develop a Mission and Vision Statements in line with what is truly important for you in your business.

## Money Made or Saved

By developing and implementing a Mission and Vision Statement into the business provides you with clarity and focus on planning and business decisions.

#RightNextThing

## Set Vision, Mission & Values

### The Task

- Do online training on MyLifestyleTradie.
- Download the Business Plan Mission & Vision Statement Workbook.
- Complete the Business Plan Mission & Vision Statement Workbook.
- Design your Mission and Vision Statements on posters so that you can feature them on the wall of your office where yourself and employees are reminded of the true business purpose.
- At the next team meeting, communicate your Mission and Vision Statements to your team so they understand the direction of your business and their role in achieving this.
- Decide which marketing strategies to feature the Mission and Vision Statements in and update accordingly. (Consider your website, information booklet, credibility pack etc)

### The Time

- 1 hour
- 15 minutes
- 3+ hours
- 1+ hours
- 30 minutes
- 2+ hours

# The Task Timer



## The Goal

To set up and establish a business trade mark.

## Money Made or Saved

By registering your business trade mark you are protecting your business from copycat competitors that would otherwise severely limit your profitability.

#RightNextThing

## Set Up A Trade Mark

## The Task

- Do online training on MyLifestyleTradie.
- Identify and make a list your Intellectual Property.
- **OPTIONAL BUT HIGHLY RECOMMENDED:** Seek the services of an IP lawyer to assist you with the following steps.
- Search existing trade marks.
- Research and understand the costs and timings.
- Complete and register the correct paperwork to file for your trade mark.
- Wait for the trade mark to be confirmed.
- Monitor the market for potential infringements of your trade mark.

## The Time

- 1 hour
- 1 hour
- 2+ hours
- 1+ hours
- 1+ hours
- 2 hours
- Ongoing

# The Task Timer



## The Goal

To design and develop a formal business plan for your trade business.

## Money Made or Saved

By having clarity and direction around where the business is headed, no time or money is wasted on anything that is not aligned with these goals and strategies.

#RightNextThing

# Set Short And Long Term Business Goals

## The Task

- Do online training on MyLifestyleTradie.
- Download the Prepare Your Business Plan Workbook.
- Complete the Prepare Your Business Plan Workbook.
- Download the Writing Your Executive Summary workbook.
- Complete the the Writing Your Executive Summary workbook.
- Download the business objective and planning exercise template.
- Complete the business objective and planning exercise template.
- Based off the business objectives and business plan, make a shortlist of items that need to be actioned.
- Action one of the items that needs to be implemented into your business.
- Review and fine tune process.
- Repeat last 2 steps until everything on the shortlist has been actioned.

## The Time

- 3 hours
- 15 minutes
- 5+ hours
- 15 minutes
- 1 hour
- 15 minutes
- 1 hour
- 1 hour
- 1+ hours
- Ongoing

# The Task Timer



## The Goal

To decide on, prepare and execute a succession or exit plan.

## Money Made or Saved

By having a succession plan you can begin to work toward the end goal and all decisions you make should be in line with this.

#RightNextThing

Prepare &  
Execute Succession  
or Exit Plan

## The Task

- Do online training on MyLifestyleTradie.
- Download the Succession Plan template.
- Complete the Succession Plan.
- Based on your Succession Plan, prepare your business for the succession.
- Execute your Succession Plan.

## The Time

- 3 hours
- 15 minutes
- 5+ hours
- 15+ hours
- 15+ hours

# The Task Timer



## The Goal

To understand the risks specific to your trade business, which the key to managing and reducing them!

## Money Made or Saved

By identifying risks, you will be able to take proactive measures to limit them from occurring.

#RightNextThing

# Diversify and Spread Risk

## The Task

- Do online training on MyLifestyleTradie.
- Brainstorm all the possible risks to your business.
- Identify the most urgent risk outlined on your list and work on a plan to minimise this risk from happening.
- Action your plan for the first risk.
- Identify the next most urgent risk outlined on your list and work on a plan to minimise this risk from happening.
- Action your plan for this next most urgent risk.
- Repeat last 2 steps until all risks on the list have been actioned.

## The Time

1.5 hours

1+ hours

2+ hours

1+ hours

2+ hours

1+ hours

# The Task Timer



## The Goal

To understand wealth creation and further develop your investing opportunities for the future.

## Money Made or Saved

By developing your wealth creation plan and creating passive income you will prosper long term, to give you and your loved ones choices throughout the rest of your life, leveraging the income you have today, to create financial freedom for tomorrow.

#RightNextThing

## Build Wealth Creation

## The Task

- Do online training on MyLifestyleTradie.
- Download the Investment Prep Checklist.
- Complete the Investment Prep Checklist.
- Review the outcome of the Investment Prep Checklist.
- Arrange a time to meet with a financial advisor to review and create a further plan to build your wealth creation plan.
- Meet with a financial advisor to review and create a further plan to build your wealth creation plan.
- Action the plan created with your financial advisor.

## The Time

3.5 hours)

15 minutes

3+ hours

1 hour

15 minutes

1+ hours

2+ hours