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# 6 MEETINGS

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The Secret Meetings of Successful  
Entrepreneurs that will Elevate your  
Business and Life

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# START HERE

As an entrepreneur you've probably read books on how to be successful. If you're like me, you've watched webinars, attended conferences and taken too many online courses.

But you somehow fall short of taking action on all that great advice.

This stupidly simple book provides a framework for staying focused on the most important activities for entrepreneurial success, the six secret meetings you have with or by yourself.

Add these six meetings to your calendar. Block out the time. Set a notification. Don't skip them! They are just for you. Honor the commitment to yourself and your business.

Some meetings occur daily, some once a week. But all are equally important!



# 1. VISION

Your vision is the light at the end of the tunnel. It's your "Why". The reason you're in business and the inspiration that keeps you going.

As entrepreneurs we often get caught up in the daily tasks of starting, growing, running a business and lose sight of why we chose this path to begin with. Your vision serves as the "big picture" of what you want for your business and life.

Remind yourself daily of your vision.

In fact, remind yourself each morning and add your vision for today to the bigger picture of your business and life visions.

Then review your vision each evening before your head hits the pillow.

# DAILY VISION MEETING

This daily meeting is divided into two parts.  
Each should take no more than 5 minutes.

Rather than put this on your calendar, I recommend you write your vision on an index card and leave it on your nightstand so it's handy for your morning and evening review.

A stack of blank cards provides an at-the-ready, and pocket-sized, resource for writing down your daily vision.

# DAILY

## VISION MEETING

### **Morning:**

Review your bigger picture vision. Read it out loud. Let it provide guidance and inspiration for your daily vision. Write down the activities you will accomplish today.

### **Evening:**

Review your vision by asking yourself:

- Did I accomplish today's vision?
- Did my activities support my big picture vision for my business?
- Did my activities align with my life vision?





## 2.MONEY

They say that "money can't buy happiness", but I say, "it sure does reduce stress". And that makes me happy.

Your weekly money meeting will keep you informed about your finances so you never have to stress about unpaid bills, business expenses or compounding debt. You'll know where you stand on cashflow, savings and planning for retirement.

Skip the bookkeeping blues by spending a little time each week to categorize your expenses and organize your invoices.

# WEEKLY

## MONEY MEETING

Add a recurring meeting to your calendar on Monday mornings titled "Money Monday". You may need to start with an hour, but will probably quickly reduce it to 30 minutes or even less.

On the meeting description, create a bullet list of your bank, accounting software, credit cards and any other bills or accounts. You may even want to list incoming payments, or receivables.

For each item, include the link for online payments, the due date and amount due.

Each week during your meeting, you will pay the bills that are upcoming that week.

Tracking receivables? Check that you received payment for invoices due the previous week and send out reminders as needed.

# WEEKLY

## MONEY MEETING

**Your Money Monday** recurring calendar entry might look something like this:

**Bank:**

WellsFargo - <https://wellsfargo.com>

**Bookkeeping:**

QuickBooks Online - [link](#)

**Mortgage:**

mortgage company - due on 1st - \$1800 - [link](#)

**Car:**

car 1 - due on 15th - \$397 - [link](#)

**Utilities:**

water - due on 3rd - approx. \$100 - [link](#)

electricity - due on 18th - approx \$165 - [link](#)

**Credit Card:**

card - due on 2nd - [link](#)

LIST

IDEA

IDENTITY  
FOCUS  
AREAS

SALES  
CUSTOMER  
RETENTION

STRATEGY

DECISION  
MAKING

PEOPLE  
RESOURCE

TEAM

RISK

LIFE  
BALANCE

k

RESPONSIVE  
WEB  
DESIGN

ANALYZE  
PERFORMANCE

DETE  
GO

PLAN

DEVELOP  
MARKETING

# 3.MARKETING

One of the most important things in growing a successful business is marketing. It's a constant cycle of driving awareness, generating leads and closing sales.

A daily focus on marketing ensures a constant flow of new and repeat customers and prevents the task of marketing from becoming overwhelming.

A quarterly strategic session allows you to outline your marketing plan for the quarter.

Then your daily marketing meeting focuses on execution.

# DAILY MARKETING MEETING

Add a daily recurring meeting to your calendar titled "Marketing". I find that, if I've planned well that quarter, 30 minutes each morning is plenty for my daily marketing activities.

While everyone's marketing tasks will be different, yours may include:

- scheduling weekly posts on social media
- making connections on LinkedIn
- drafting your monthly newsletter
- writing a blog post
- community building in facebook groups
- sending marketing pieces to the printer
- creating an online ad on facebook or Google
- or any other activities related to your quarterly marketing campaign (such as, checking in with a copywriter, designer or website manager)

# SHAMELESS PLUG

Marketing can be confusing and paralyzes many entrepreneurs and small business owners.

Maybe you find yourself with shiny object syndrome, following every guru's most recent "one thing". I call that Marketing Madness! It's a real thing!

In 2012 I left a 20+ year career in corporate marketing to focus on helping small businesses and entrepreneurs leverage the internet to drive awareness, attract customers and grow their businesses.

While my own business has evolved, the vision remains the same, to serve small businesses and provide enterprise-level marketing support.

If we can help you **minimize marketing madness**...visit us online at [localwerx.com](http://localwerx.com).





## 4.LEARNING

Personal development and learning often get pushed to the back. Set up a recurring meeting for yourself to focus on reading a book, improving your skills and learning something new.

As Harry S. Truman said,

*"Not All Readers Are Leaders.  
But All Leaders Are Readers".*

My friend Kathie York ([kathieyork.com](http://kathieyork.com)), the self-proclaimed Queen of Non-overwhelm, calls Friday her "learning day". She blocks her calendar and spends the day learning new things, reading, chatting with friends and colleagues (sometimes me!) about business growth. How do you embrace continuous learning?

# WEEKLY

## LEARNING MEETING

While you may already have a habit of daily reading, this meeting is about more in-depth learning. You decide how much time you can dedicate each week, and block it out on your calendar. An hour or two is a good start.

The more time you dedicate to learning, the more you will know.

Don't overlook this important commitment to self-improvement.

You might even combine it with our next meeting, self-care. Maybe you dedicate an entire day to learning & self-care combined.

**Genius Tip:** take your favorite business book to the salon and read while you get a pedicure.

**Learning + self-care = genius**

# FAVORITE

## BOOKS I LOVE

About two years ago I realized that it had been years since I read a book (except *Outlander*. I read every one of those! Twice).

Since then I've made up for lost time. Before the coronavirus pandemic, Audible was a my best friend. Any time I was in the car, I was listening to book. Here are some of my favorites:

- *12 Week Year*, Brian Moran (great approach to planning and goal setting)
- *Sell Like Crazy*, Sabri Suby (I went through two highlighters reading this book and refer back to it often.)
- *Marketing Made Simple*, Donald Miller
- *Entreleadership*, Dave Ramsey
- *The 5 Second Rule*, Mel Robbins
- *Influence*, Robert B. Cialdini
- *The Lazy Manager's Unconventional Guide to Remarkable Results*, Jim Plouffe



## 5.SELF-CARE

Self-care is the practice of taking an active role in protecting one's own well-being and happiness.

To you this may mean blocking out time for meditation, exercise or relaxation. It may involve pampering at the spa or salon. You may need a round of golf or a game of hoops with your buddies. It most certainly means time away from the stressors of work.

Whatever it means for you, make sure you schedule daily or weekly self-care sessions and hold yourself accountable for your own well-being.

# DAILY SELF-CARE MEETINGS

Add a daily recurring meeting to your calendar for

- exercise
- meditation
- daily reading
- walking the dog
- relaxing in a hammock or on a float in the pool
- eating a healthy lunch (if you tend to work through this important meal)
- doing the dishes

Yes! Even completing household chores can be a form of self-care if getting things done reduces stress and makes you more relaxed or content.

# WEEKLY

## SELF-CARE MEETINGS

Weekly self-care might involve a longer meeting durations.

Here are a few ideas:

- schedule a weekly massage or mani/pedi
- invite a friend to lunch on Fridays
- get some retail therapy with mid-week shopping
- treat yourself to a matinee at the movies
- go for a drive and see new things
- sleep in and then binge-watch Hallmark movies in your jammies all day
- take a hike or a long bike ride





## 6.FAMILY

While I left Family for last, it's the most important "meeting" of all. You probably won't put this meeting on your calendar, but should prioritize this meeting over others. When you started your entrepreneurial journey, spending more time with family was probably one of the main motivators. And family means the friends you consider family, too.

But you've heard the saying, "Entrepreneurs are the only ones willing to work 80 hours a week to avoid working 40."

Don't let your work consume you! Your family misses you.

At the end of the day turn off the computer, silence the phone and give your family 100% of your attention. Spend time enjoying your loved ones. After all, they're the reason you do what you do.

# DAILY FAMILY MEETINGS

More "family time" than meeting, set a specific end to your business day.

Turn off the lights and shut the door.

Enjoy time with your spouse.

Play with the kids.

Pet the dog (or cat or parakeet, whatever).

I like to remind myself daily of why I chose this entrepreneurial path.

Here are some of my reasons I love what I do. I hope they inspire your time with your family.

# FAVORITE

## FAMILY MEETINGS

**Some of my favorite family meetings:**

- weekday trips to the lake
- snuggling on the couch after lunch
- road trips to visit family
- family breakfast with blueberry pancakes
- the kiddo's orthodontist appointment on Wednesday afternoon (no problem)
- Taco Tuesdays (or Mai Tai Tuesdays, or both)
- working remotely from a condo in Kona (with plenty of beach time & family fun)
- baking brownies just because
- mid-day dance parties
- mother-daughter lunches



# WRAPPING UP

I hope my stupidly simple tips for prioritizing these activities for entrepreneurial success are helpful and inspiring.

I'll add one more thing I've learned over the past decade as an entrepreneur. Give yourself Mondays. Block out the entire day. Avoid scheduling client meetings. Just give yourself Mondays to work on your business, get organized and ease into the week.

Do that, and incorporate the 6 meetings. You'll be better for it.





