

FREEDOM - GROWTH - GENEROSITY - INTEGRITY - COURAGE

Summer Retreat

THE WORKBOOK



workshopwhisperer

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THE THREE W'S

WINS

What are your biggest wins?

WORKING

What's working well now?

WANT

What do you want out of the next 2 days?

YOUR DAY ONE INSIGHTS

**MONEY
MINDSET &
MAGIC**

1

2

3

**JASON
WHITTON**

1

2

3

MASTERMIND

1

2

3



YOUR DAY TWO INSIGHTS

THE PROFIT PROPHETS

1

2

3

THE 5 FINANCIAL REPORTS TO LOVE YOUR NUMBERS

1

2

3

STRATEGIC PLANNING

1

2

3

YOUR GAME PLAN

1

2

3



MONEY MINDSET & MAGIC



SABOTAGES & MONEY BLOCKS

Think about how you treat money currently and everything associated with it...

NEVER

SOMETIMES

ALWAYS

I spend all of my money as soon as I get it

I often manifest unexpected bills

I barter with people instead of being paid

I barter with people instead of paying them

I have many old clients who are paying old, outdated fees

I'm afraid to increase my prices for fear of losing clients

I get regular parking or speeding fines

I've recently crashed or damaged my car

I procrastinate following up when I know I should

I forget to pay my bills on time and have to pay late fees

I forget to return things and get overdue fees

I feel afraid to open my bills

I hate asking friends or family to pay back money debts owed to me

I'm not sure where my money goes

I pay off my credit cards and then max them out again

I never save a penny or I raid my savings account when I run out of money

When I have a good money month, I blow it all

I pay off debt and then get straight back in within weeks



SABOTAGES & MONEY BLOCKS

- I feel uncomfortable having extra money in the bank & feel compelled to spend it
- I feel guilty about spending money when there are people struggling in the world
- I feel an unconscious need to give it away, spend it or even repel it
- When I have cash in my wallet, I'm not comfortable until every single cent of it is gone
- I regularly put others first financially
- I mostly pay for others (i.e. reaching for the restaurant bill first)
- I never let someone else pay for me
- I feel guilty when others pay for me
- I lend money to others even when I don't have it for myself
- I punish myself about being in debt by living frugally
- I spend money in ways that don't enrich my life
- "I put my head in the sand when it comes to "adult" stuff like retirement savings, insurance and other "boring" stuff"
- My partner deals with the money stuff and I mostly ignore it
- I'm in denial about my debt
- I have no idea how much debt I have
- I'm unclear on what interest rate I'm paying on my debts
- I'm afraid to save money in case I need it
- I feel uncomfortable having extra money in the bank & feel compelled to spend it

SABOTAGES & MONEY BLOCKS

I'm afraid to spend money in case I'll have nothing left

I often let paperwork pile up

I avoid looking at my bank account

I feel weird when I have extra money in the bank

I feel guilty that I have so much and others don't

I struggle to stay positive about money

I often fantasise about winning the lottery

I often wish that someone would rescue me financially

I worry that if I got rich, I'd blow it all and be worse off

I sometimes daydream / obsess over problems I'd have if I was rich and famous

I go between being stingy and completely wasteful with my money

I feel guilty making money out of things that are easy for me

I feel guilty about upgrading my team

I make excuses like "I'm not ready" when an opportunity presents itself

I travel with an economy class mindset

I'm surrounded by people who have hit a business plateau

I'm surrounded by people struggling in business

I'm embarrassed to negotiate and always take the first offer

I resent other people's business success

SABOTAGES & MONEY BLOCKS

I try to do taxes, bookkeeping or accounts myself when it's not what I'm good at

I do tasks in my business that stress me out

I'm afraid to ask clients for overdue money

I use my horoscope or Mercury Retrograde as an excuse

I ignore my intuition about working with possibly annoying clients

I feel like I want to quit my business

I hide behind a persona online

I avoid posting pictures of myself in my business

I'm afraid to give feedback to my team - I just quietly fix mistakes

I stay with old suppliers because I don't want to hurt their feelings

I'm obsessed with a business nemesis and I "hate-read" all their stuff

I feel empty about my successes

I avoid celebrating milestones, I just move on to something else

I fixate on my mistakes rather than my successes

I make do with old equipment that costs me time &/or money

I live on adrenaline and can only do tasks last minute

I'm afraid to read constructive feedback because it makes me feel anxious

I avoid reading my testimonials or praise

I procrastinate asking for testimonials

SABOTAGES & MONEY BLOCKS

I take business advice from all sorts of random people

I'm afraid to set goals or money targets because I think I'll jinx it

I ignore broken links on my website

I ignore or don't follow up with potential clients

I often don't invest in the right solution for my business and then get annoyed when it doesn't work

I take on clients for the money even when I know I'll regret it

I'm reluctant to reward or acknowledge myself for a job well done

I compare myself to others and feel jealous or inferior

I let other people's opinions sway my business decisions whether they're qualified or not

I procrastinate putting good payment systems in place for my customers to pay me

I resist putting together systems

I reinvent the wheel every time

I spend big money for personal development but I'm cheap in other ways for my business

I'm afraid to invest more money in marketing

I think that my emails "bother" people

I get sick every time I have a big deadline

I try and do everything myself to prove that I can

I buy expensive courses and then don't do them

I obsess over criticism or hate mail (whether I actually have it or not)

SABOTAGES & MONEY BLOCKS

I'm afraid to invest in an upgraded website

I find being consistent with my marketing boring

I hide away and disappear online

I get annoyed when someone takes action on something I've wanted to do for a long time

I charge low rates for my industry

I complain or bitch about my competitor's pricing

I attract the wrong customers

I give away a lot of time for free

I hire the wrong people

I procrastinate growing my team

I ignore problems with my staff for way too long

I tell myself that I don't really want success when I'm procrastinating

I don't feel like I've deserved my success unless I work really, really hard for it

I feel like if "everyone else is doing it, I'm going to do the opposite", even if it sabotages my success

I rebel even when it costs me money

I outgrow masterminds but feel bad about wanting to leave

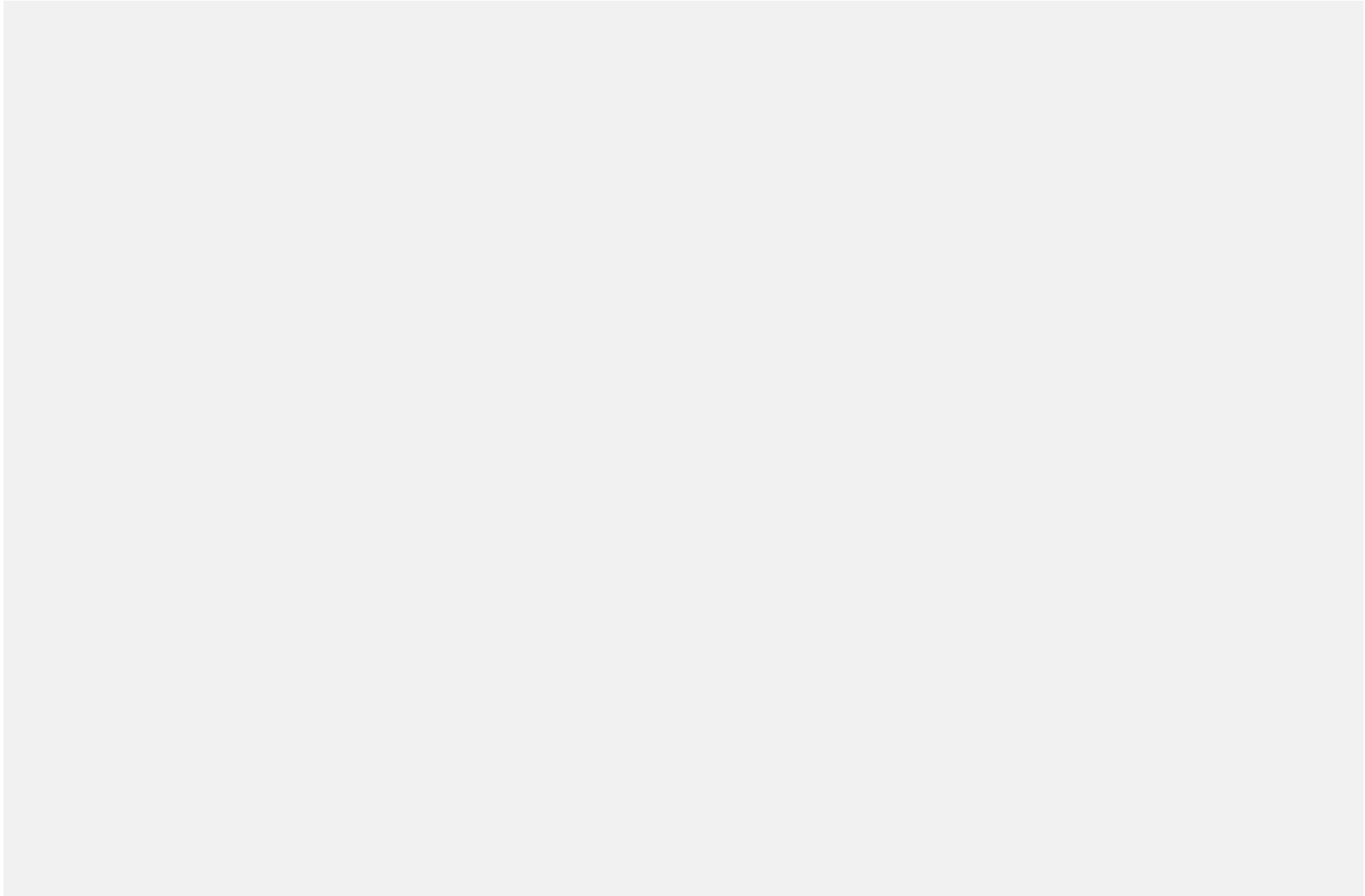
I forget to pay myself regularly

I'm too scared to pitch myself for PR or media opportunities

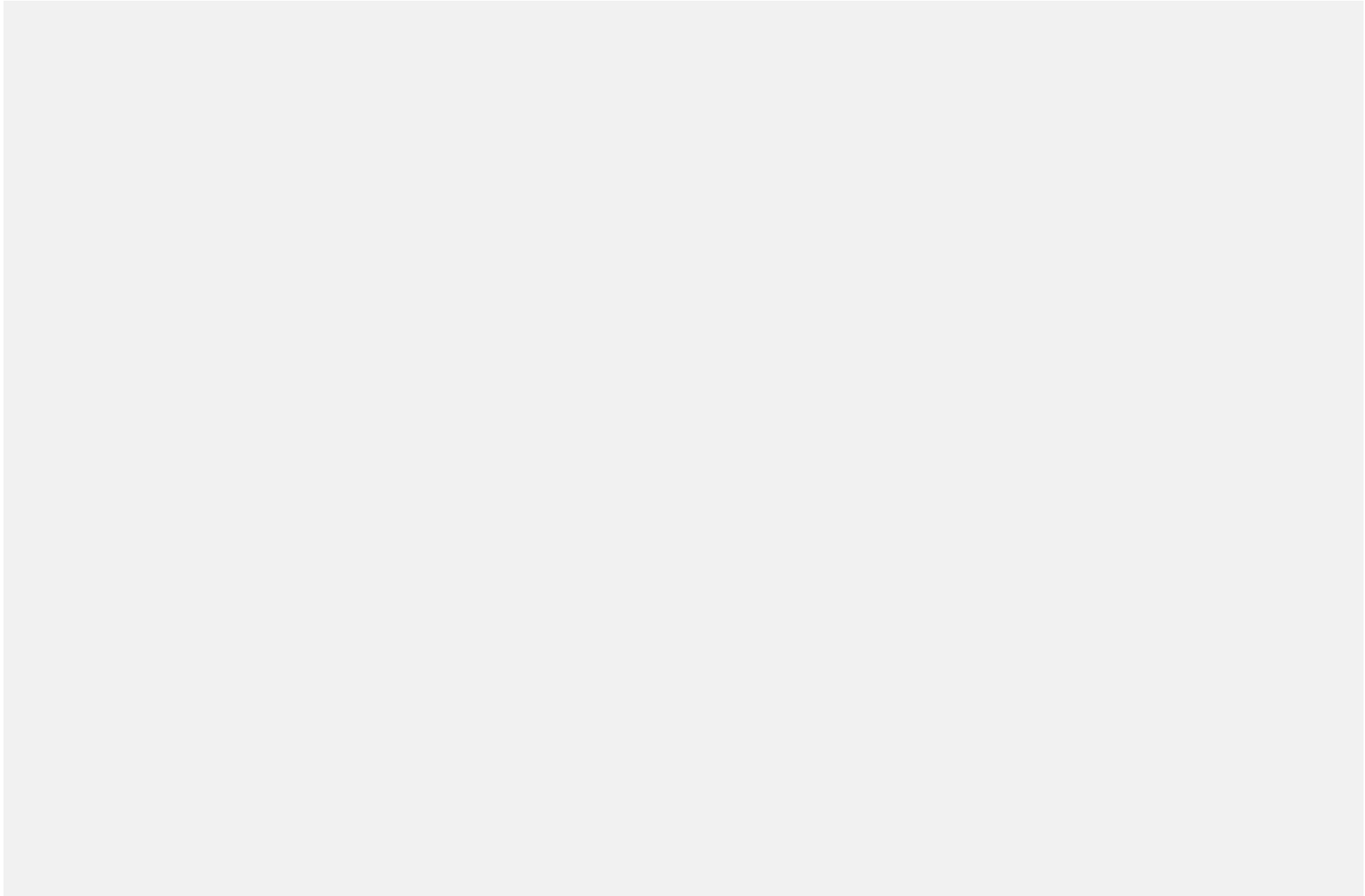
I often stay in my comfort zone



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INSIGHT

ACTION

DECISIONS

STOP

START

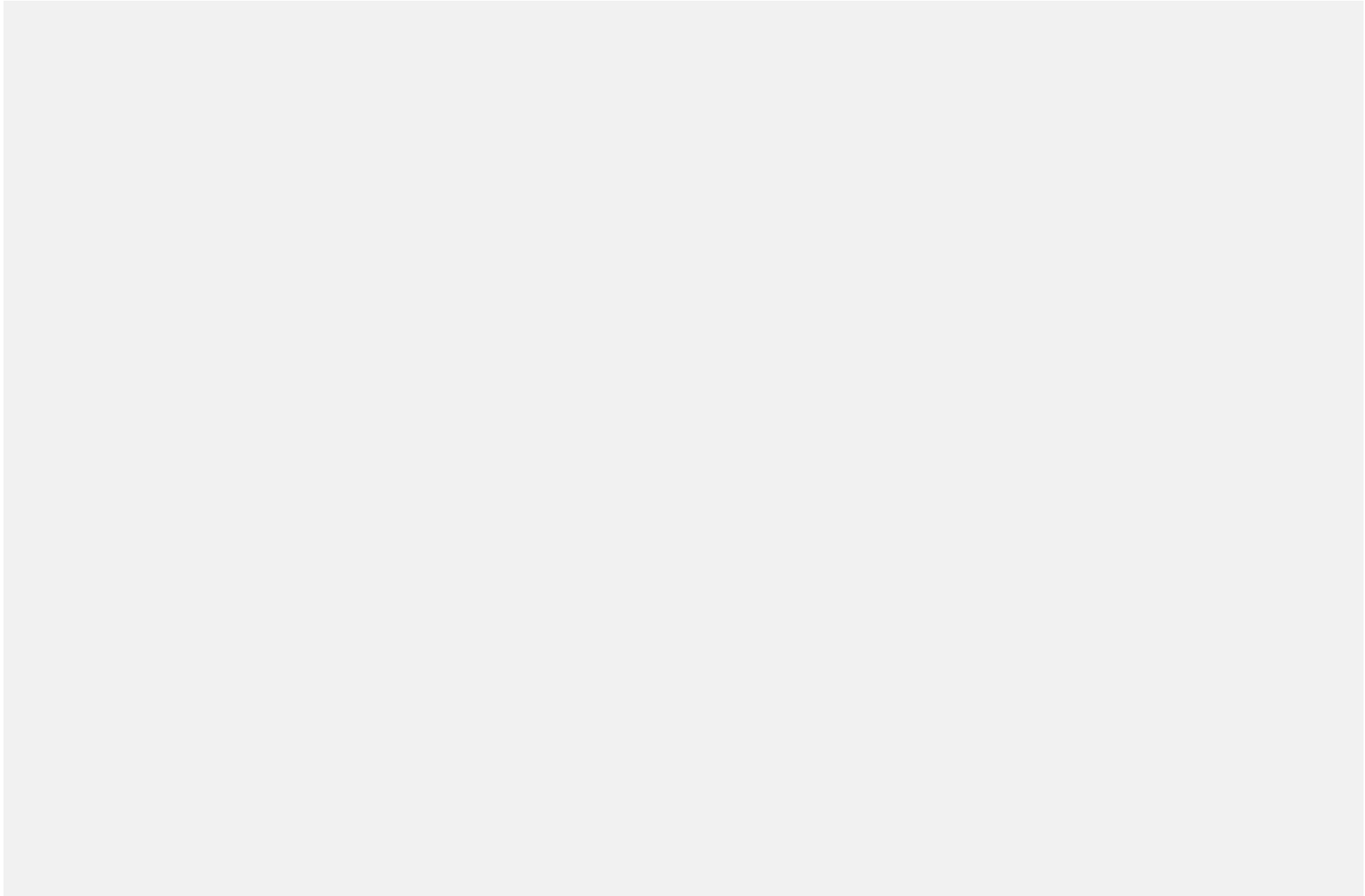
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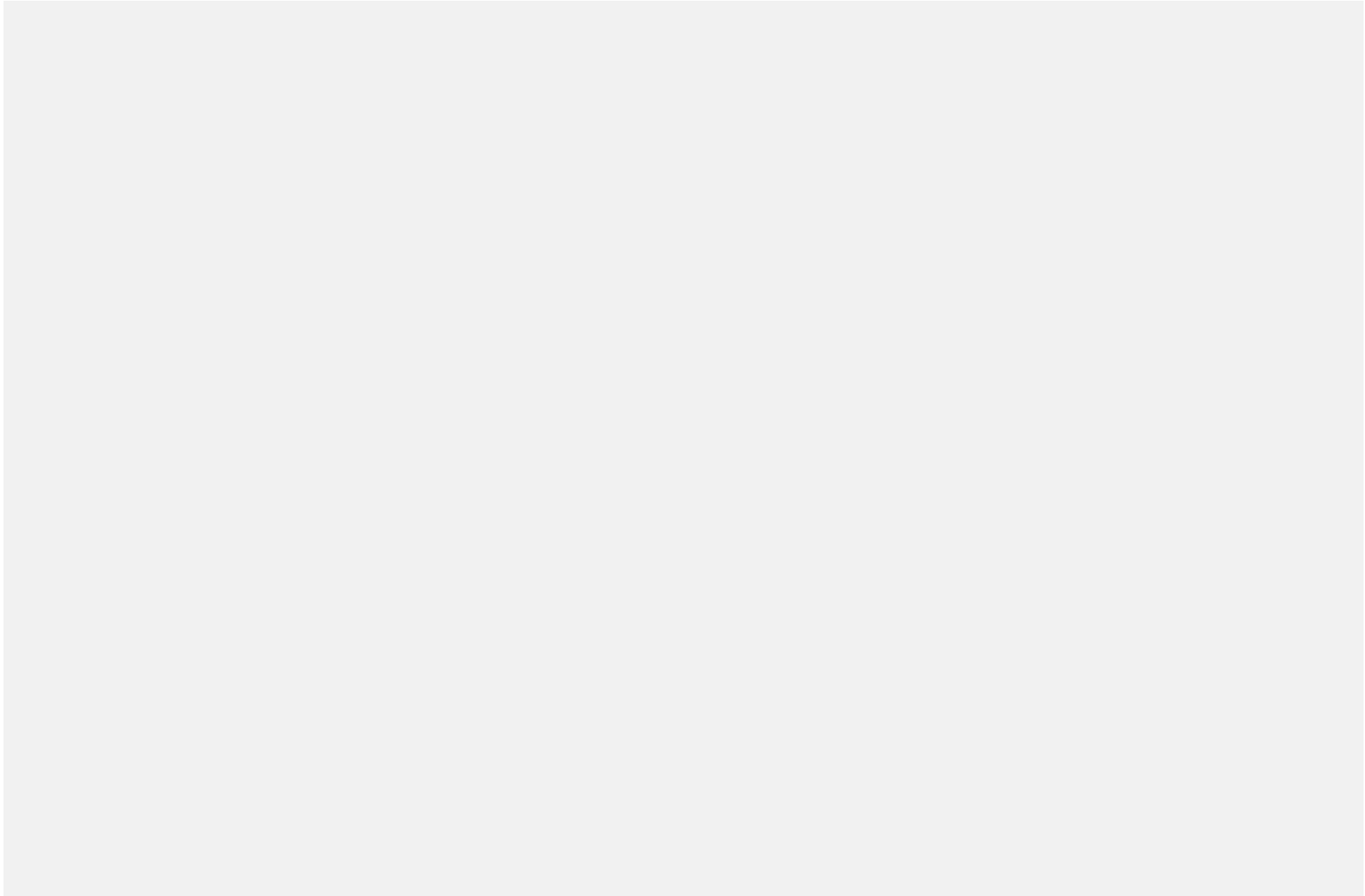
JASON WHITTON



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KEEP



MASTERMIND



The #1 thing that's holding me back is ...

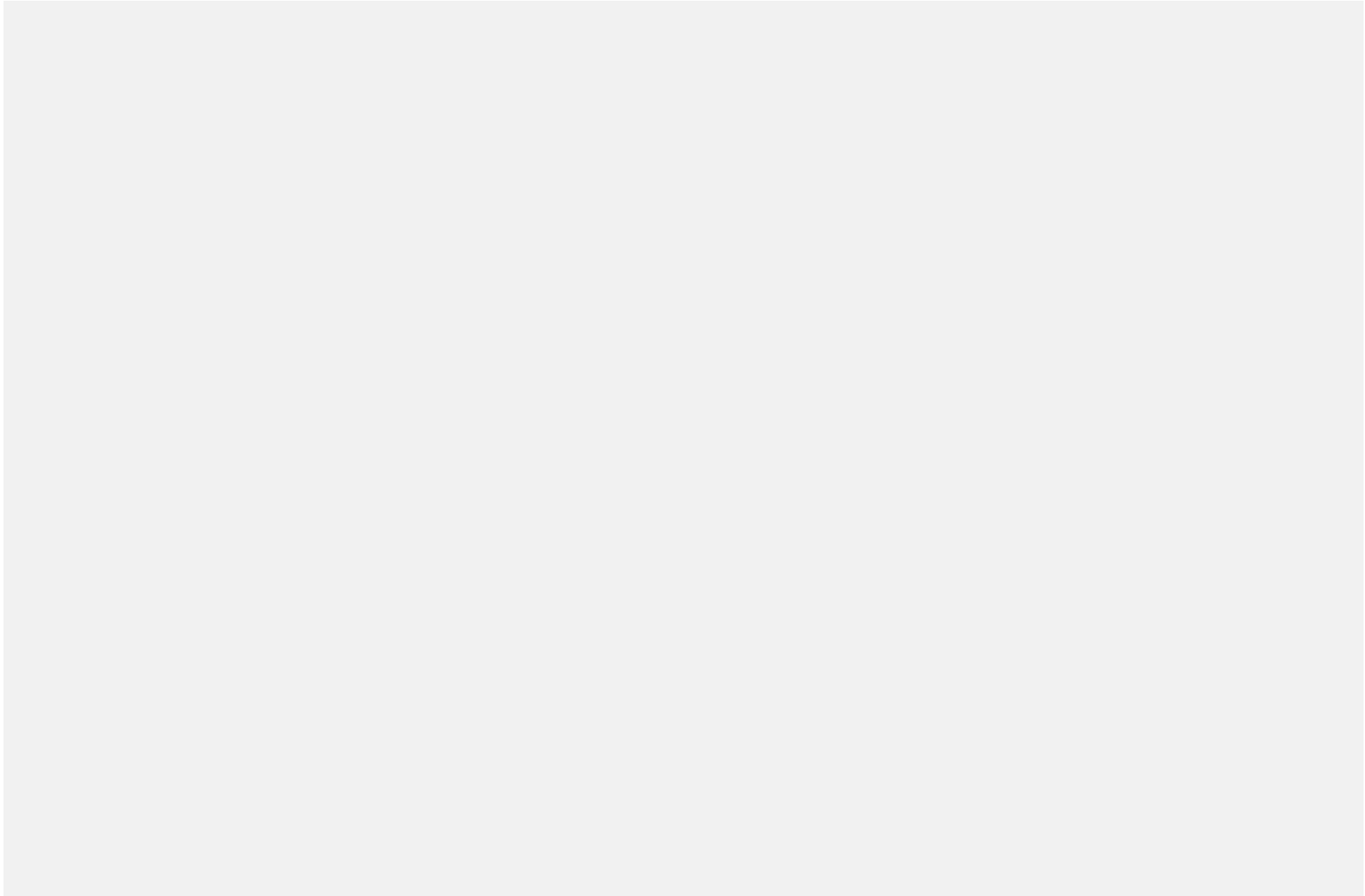
My specific question is ...

Insight

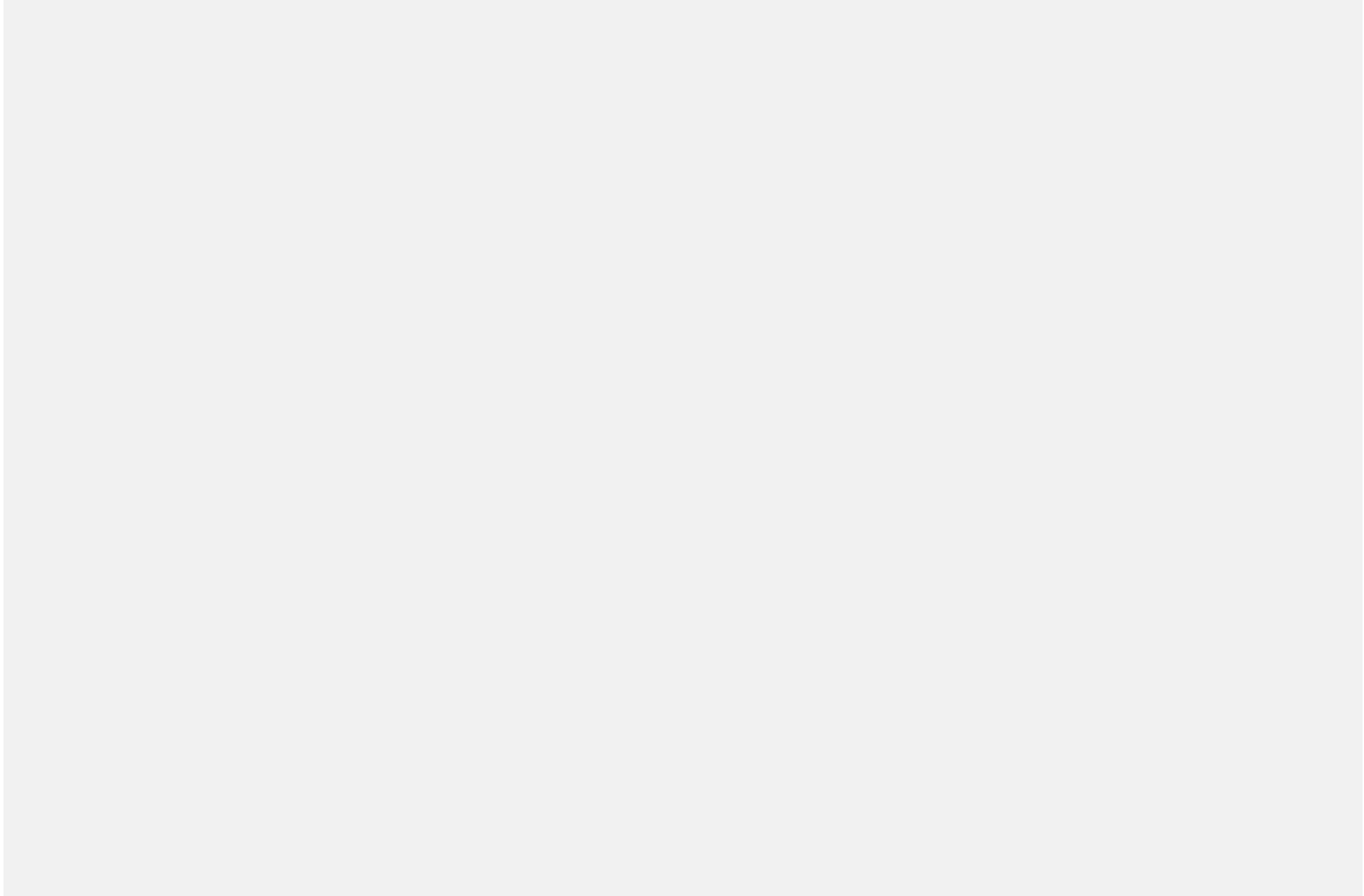
Actions



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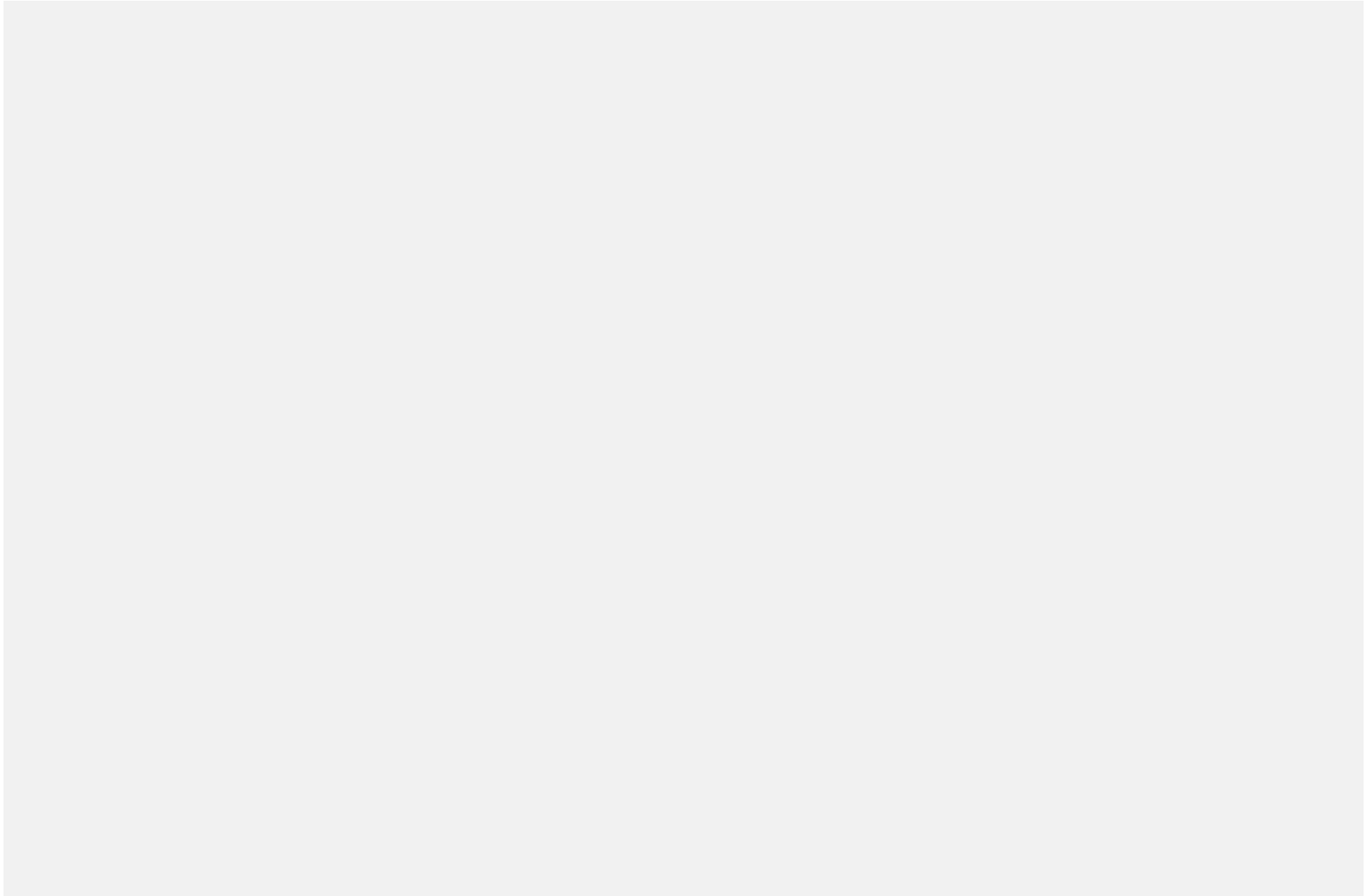
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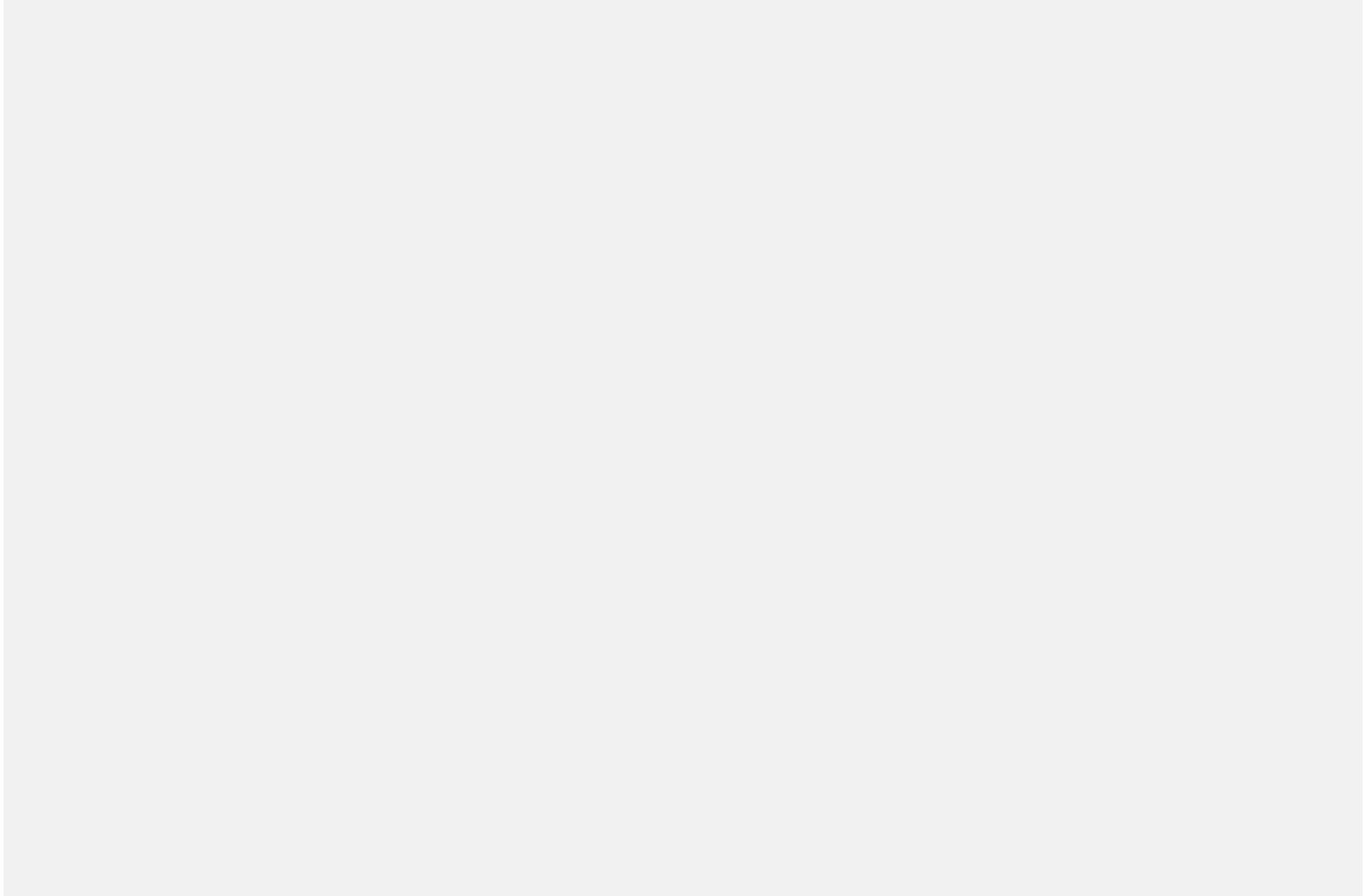
THE PROFIT PROPHETS



NOTES



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INSIGHT

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THE 5 FINANCIAL REPORTS TO LOVE YOUR NUMBERS



The Small Business Financial Success Loop

CUE

CRAVING

1

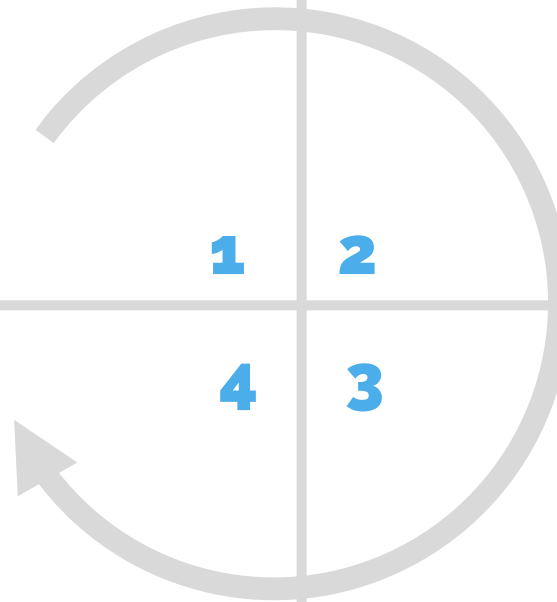
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4

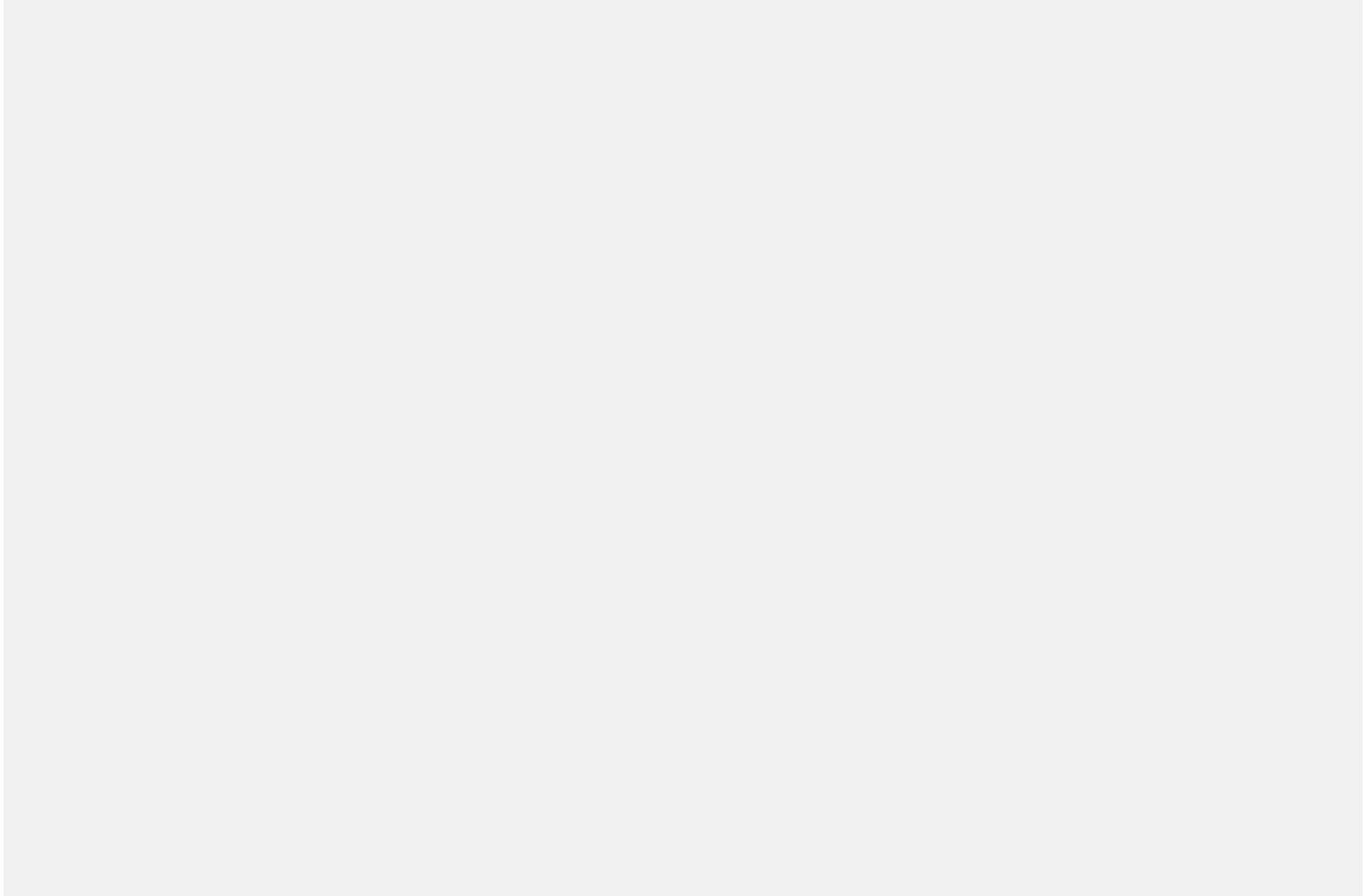
3

REWARD

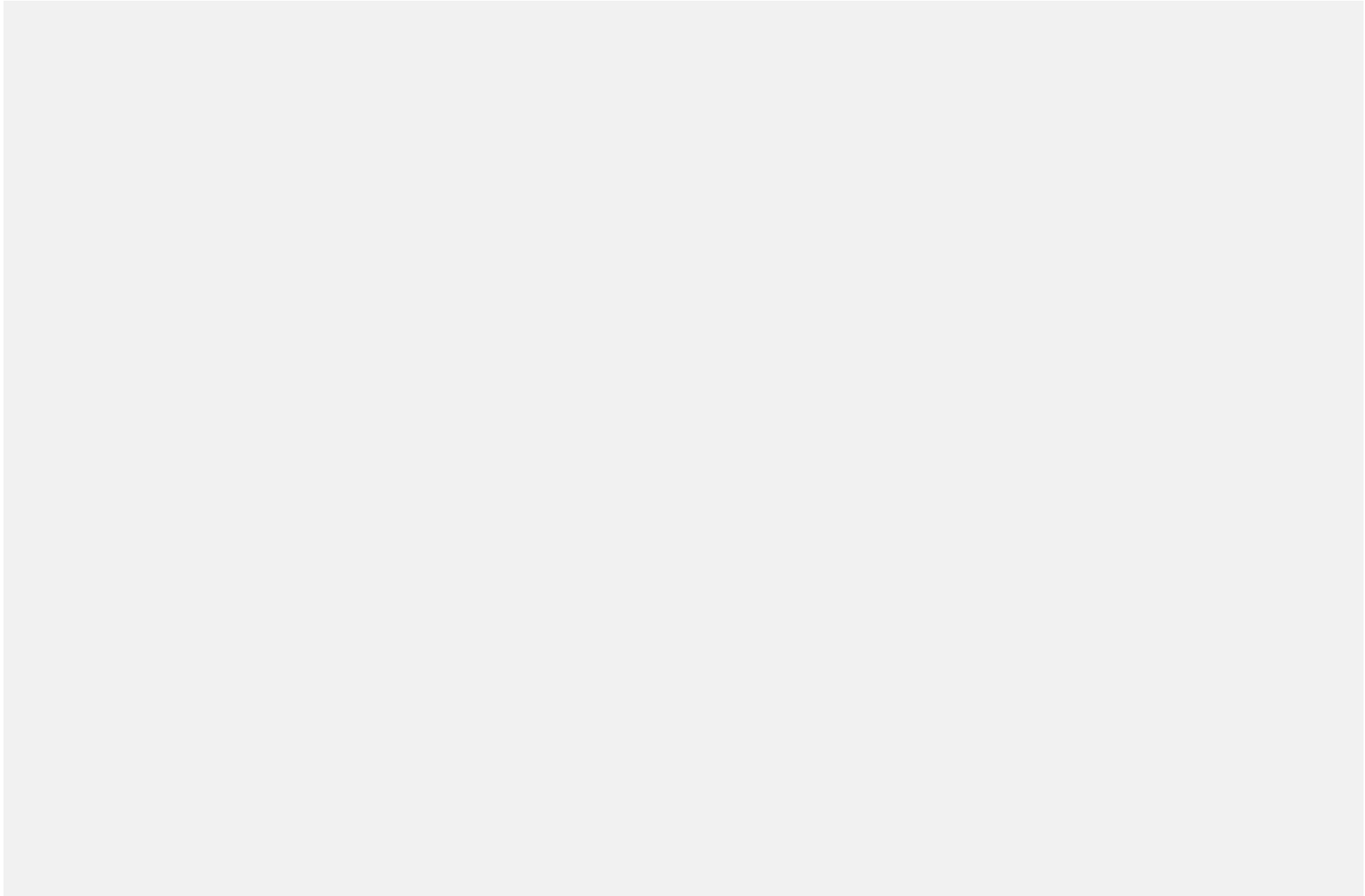
RESPONSE



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ACTION

DECISIONS

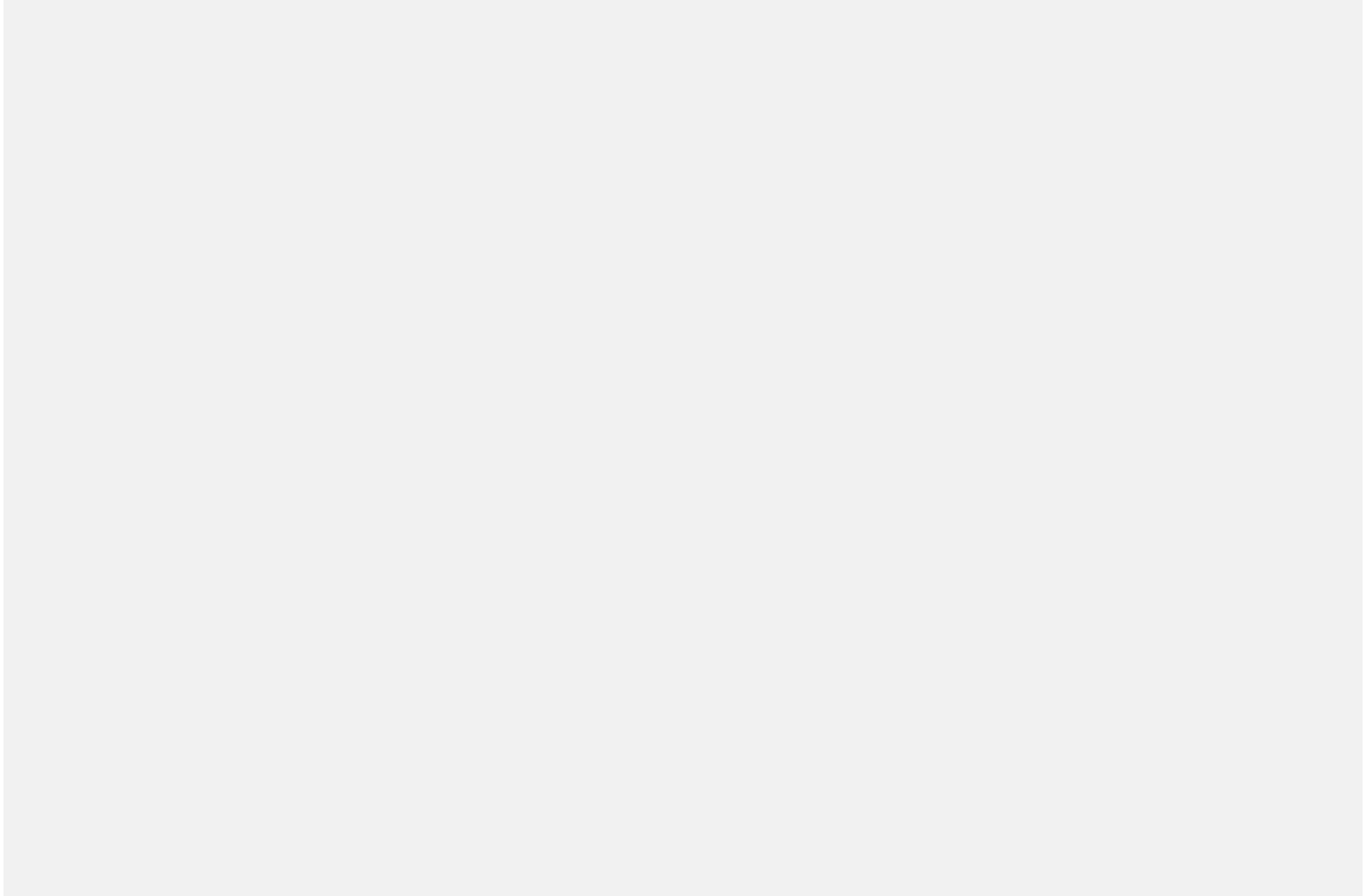
STOP

START

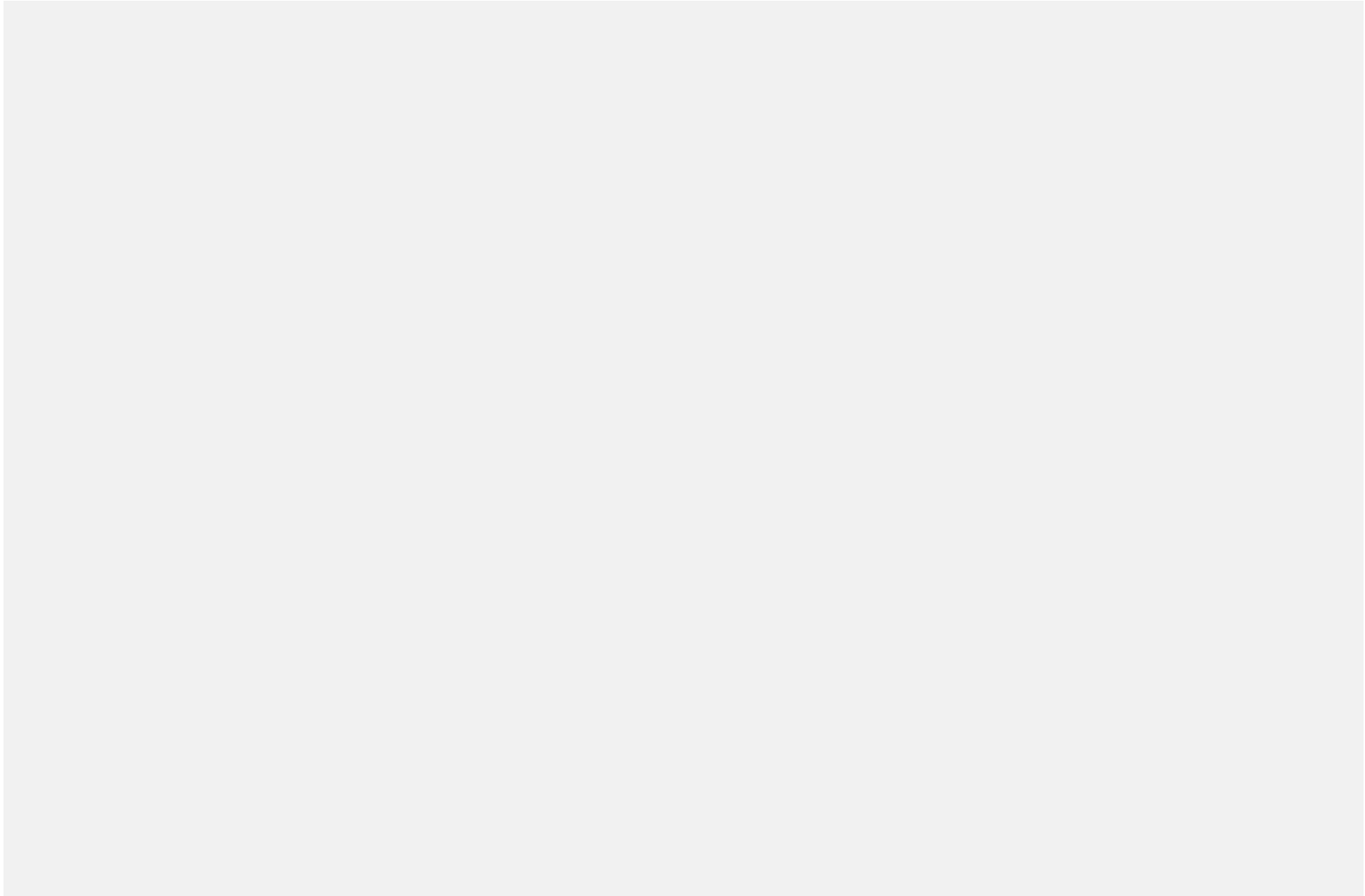
KEEP



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YOUR GAME PLAN



The Quarterly Gameplan™

Date: _____

Vision		Theme		Boulder		Additional Revenue Required		New Leads Per Week Required		Name		Witness	
				Who									
				Best Case									
				\$ Saved		\$ Made							

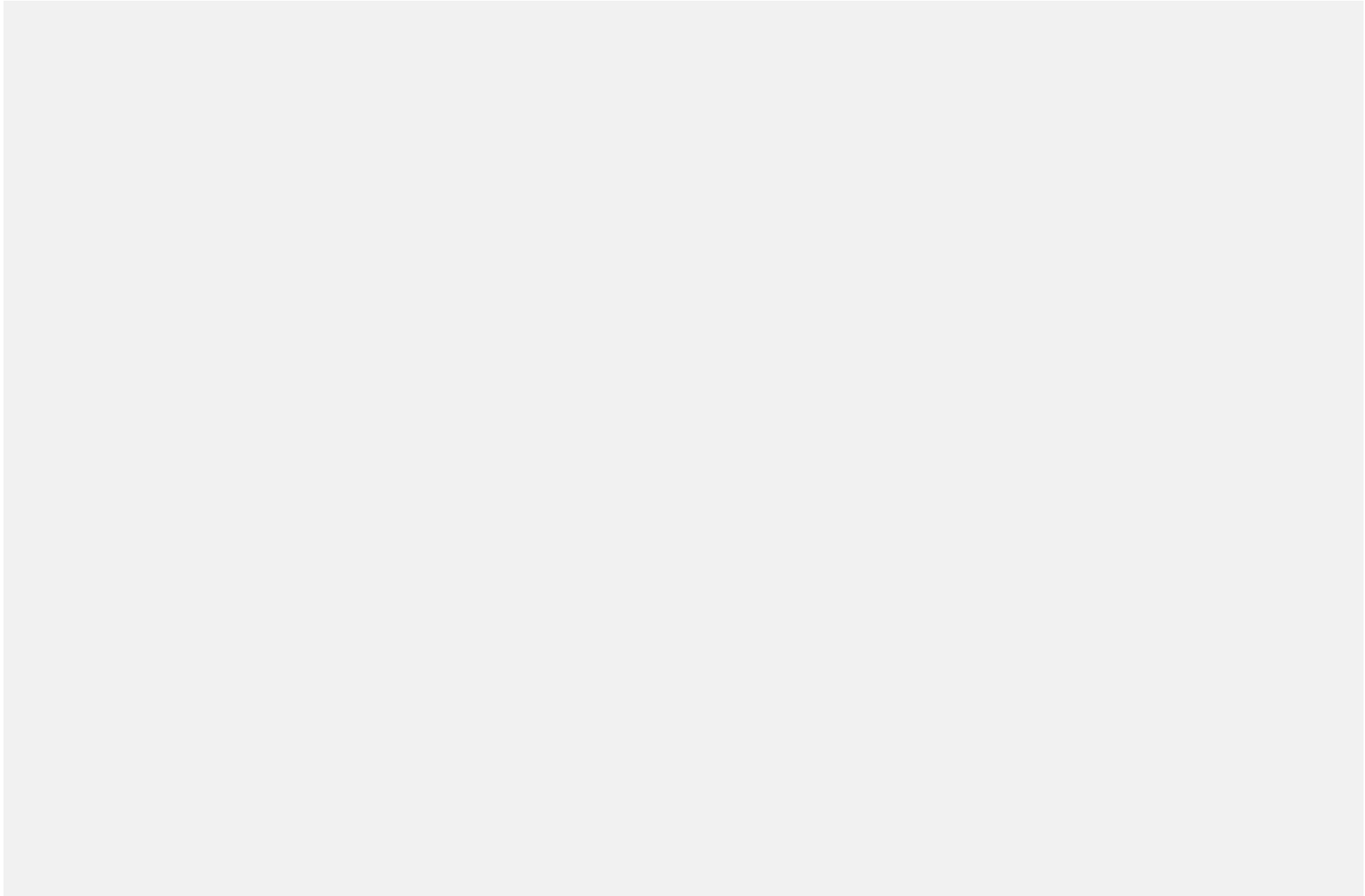
Money Made		Money Saved		Total Value		Rock #1		Rock #2		Check-ins			
						Who		Who					
						Best Case		Best Case					
						\$ Saved		\$ Made					

Motivation				Pebble #1		Pebble #2		Pebble #3		Pebble #4		Leverage		Reward	
_____				Who		Who		Who		Who					
_____				Best Case		Best Case		Best Case		Best Case					
_____				\$ Saved		\$ Made		\$ Saved		\$ Made					

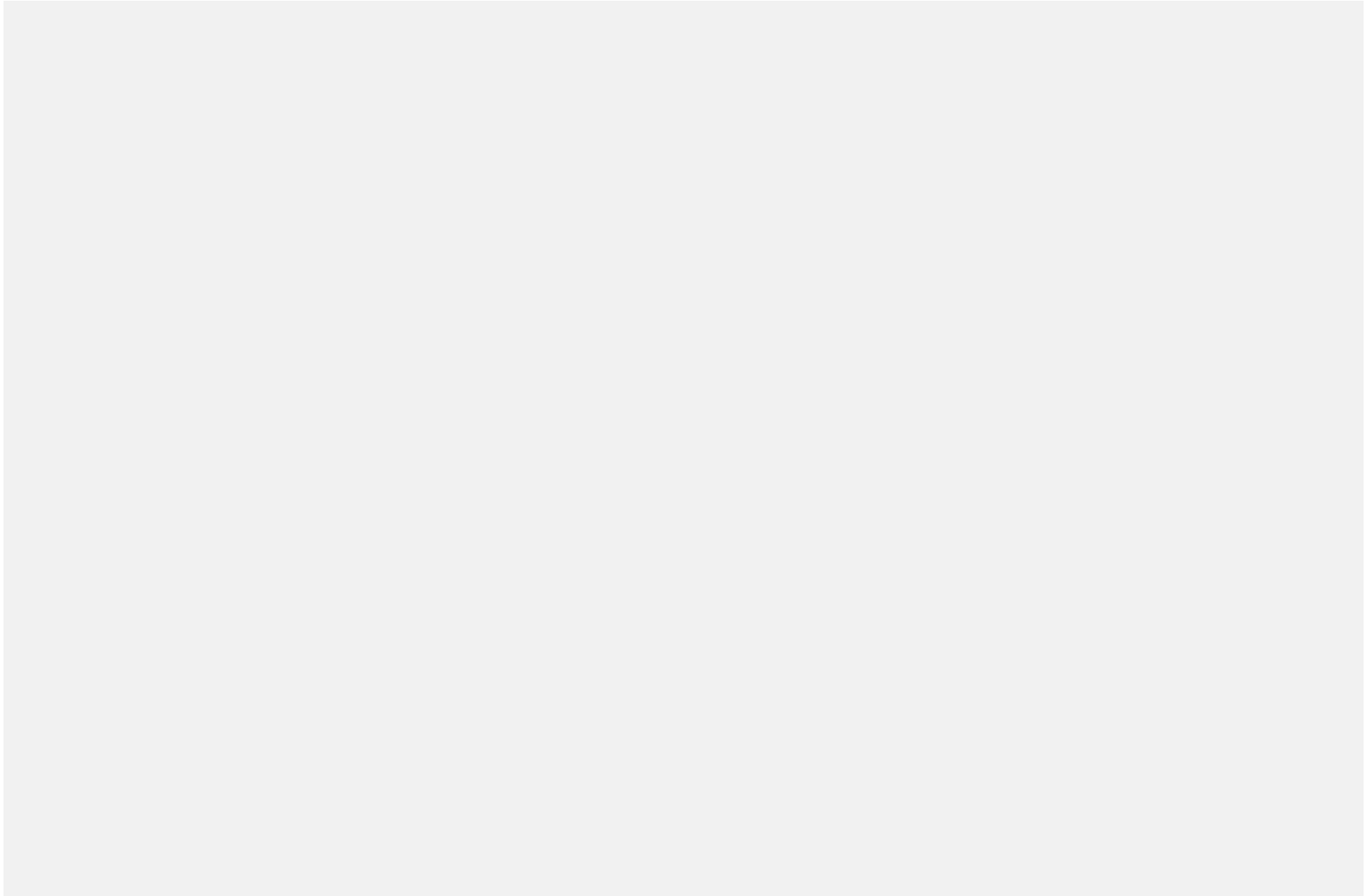
Sand #1		Sand #2		Sand #3		Sand #4		Sand #5		Sand #6		Next Band	
Who		Who		Who		Who		Who		Who		<input type="checkbox"/> 24% profit <input type="checkbox"/> 21% profit <input type="checkbox"/> 18% profit <input type="checkbox"/> 15% profit <input type="checkbox"/> 12% profit <input type="checkbox"/> 9% profit <input type="checkbox"/> 6% profit <input type="checkbox"/> 3% profit	
Best Case		Best Case		Best Case		Best Case		Best Case		Best Case			
\$ Saved		\$ Made		\$ Saved		\$ Made		\$ Saved		\$ Made			

Project Cycle #1		Week 2		Week 3		Week 4		Week 5		Week 6		Cool-down & mid-cycle check-in		Project Cycle #2		Week 2		Week 3		Week 4		Week 5		Week 6		Cool-down & mid-cycle check-in	
Week 1														Week 1													

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