



# THE POWER OF INFLUENCE

## WORKBOOK



DONNA MILLER  
BUSINESS GROWTH CONSULTING



C<sup>3</sup> WORKPLACE  
▲ connect    ▲ collaborate    ▲ community

Knowledge is NOT Power, APPLIED knowledge IS Power.

*Donna Miller*



## Learning Objectives

### The Power of Influence

During the Power of Influence session, you will learn the foundations and importance of **personal branding, storytelling, and influence**. You will hear how **confidence** is a *practice* that fuels **influence**. Since we know that *applied* knowledge is power, you will then understand the importance of EXECUTION – cutting through all the possibilities and determining a clear plan forward to produce the results you desire.

---

### Setting Expectations

**It only works if you work it.** There is no magic answer. There is no secret sauce. Sorry.

But, by combining the **right target market**, with the **right message** and the **right behaviors**, you absolutely WILL improve your results.

Do the behavior, stay focused and lean on each other -- *you will succeed*.

---

### About Donna Miller



**Donna Miller** is Chief Visionary Officer at C3Workplace and Principal at Donna Miller Business Growth Consulting. She is a business and community leader, a speaker, an educator and an entrepreneur who is passionate about seeing small businesses thrive.

She and her team have helped thousands of companies to start and grow by providing business growth consulting, office space, virtual assistance and bookkeeping. She believes that companies should be a force for good and she very much believes in the power of collaboration – the C3 in C3Workplace stands for Connect, Collaborate, Community.

She is the recipient of numerous awards, she is a sought-after speaker, an author and is grateful to be a servant leader in many volunteer and pro bono roles. She is a regular blogger and can often be found feet in the sand, on a beach, creating and writing.



**THE POWER OF INFLUENCE** Workbook is meant to be a starting point and it is meant to be a living document. Strategic Planning is a creative process, and like any creative process, it needs to evolve and manifest over time. But it is where you will find focus and focus will drive results.

At the end of this book, you'll see a recommended reading list. One of the books I recommend you read is Rachel Hollis' [Girl Stop Apologizing](#). From that book, my desire for each of you through this process is that you will:

- Be the kind of woman you want to be
- Be the kind of woman who is proud to be herself
- Be the kind of woman who has so much love inside her that she won't be tempted to change herself in order to get love from others
- Be the kind of woman who focuses more on being interested in other people than thinking she's interesting
- Be the kind of woman who laughs loudly and often
- Be the kind of woman who is generous – no matter how much money is [or isn't] in your bank account, you have a wealth of resources to offer others
- Be the kind of woman who spends a lifetime learning, because [applied] knowledge is power and those who think they know it all are often the dumbest among us
- Be the kind of woman both your 11 year old self and your 99 year old self would be proud of
- Be the kind of woman who shows up for her life
- Be the kind of woman who understands she was made for more
- Be the kind of woman who believes she is capable of doing amazing things in his world
- Be the kind of woman whose own dreams make her nervous – and then she goes and does them anyway
- Be the kind of woman who never asks permission to be herself.

---

I believe as women, you are uniquely gifted to achieve tremendous professional success and I believe you can change your clients' lives and as such, the world. That said, learn to set boundaries and remember that NO is a complete sentence. Lean on each other, leverage your innate ability to figure it out and to collaborate.

Embrace the journey ....

Gratefully,

Donna Miller

[donna@donna-miller.com](mailto:donna@donna-miller.com)

973-509-4632 (call or text)



---

## NOTES, OBSERVATIONS & "A-HA'S!"

---





---

## NOTES, OBSERVATIONS & “A-HA’S!”

---





## Planning Notes Quadrant page

Take a few moments to summarize & organize your notes into the following quadrants.

<p style="text-align: center;"><b>Strategies</b> <i>Key Points, Tactics, Methods, Trends</i></p>	<p style="text-align: center;"><b>Inspiration</b> <i>Feeds Your WHY – your future Motivation</i></p>
<p style="text-align: center;"><b>Execution</b> <i>Steps to get it done – break it down</i></p>	<p style="text-align: center;"><b>Desired Results</b> <i>Quantifiable, Measurable Goals</i></p>

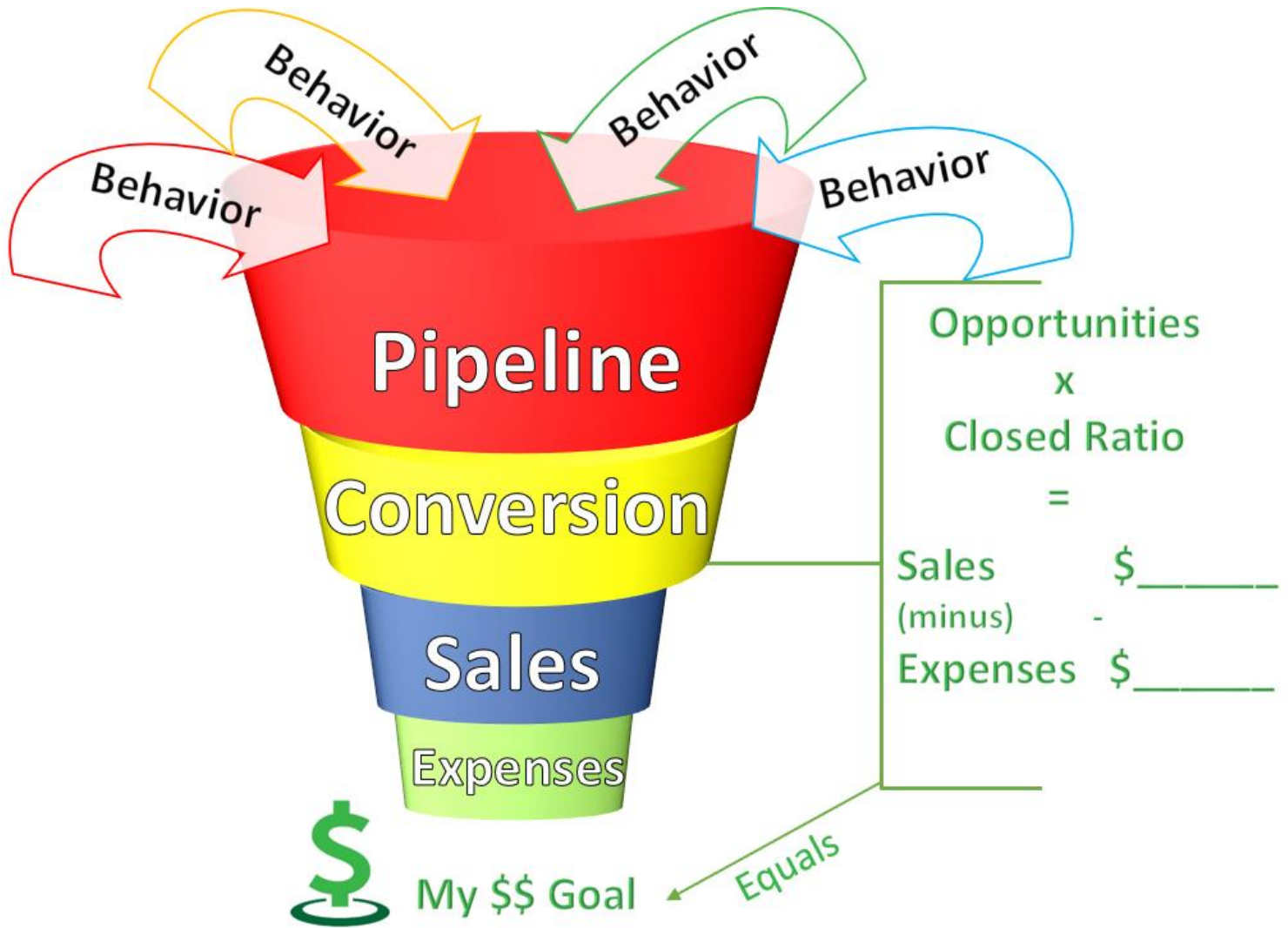
**“KNOWLEDGE IS NOT POWER. APPLIED KNOWLEDGE IS POWER. MAKE IT HAPPEN.”**

Donna Miller, Founder C3Workplace & The Small Business Evolution Academy





## Your One Page Business Plan



**You cannot do it all**

**Focus on the core BEHAVIORS that will keep your pipeline full**



## Personal Branding

*Your Personal Mission, Values, Vision*

### Mission

**What do you do?** *(think compelling, differentiating language)*

---

---

---

---

---

### Values

**What do you stand for?** *(what are your top 3 values, in order – see exercise page 10)*

---

---

---

---

---

### Vision

**Where are you going?** *(this may be for you or it may be public)*

---

---

---

---

---



## Your Values

*Values are the cornerstone of your “Why” as well as your “Mission, Values, Vision” and should be the foundation for ALL you do.*

- Authenticity**
- Achievement**
- Adventure**
- Authority**
- Autonomy**
- Balance**
- Beauty**
- Boldness**
- Compassion**
- Challenge**
- Citizenship**
- Community**
- Competency**
- Contribution**
- Creativity**
- Curiosity**
- Determination**
- Fairness**
- Faith**
- Fame**

- Friendships**
- Fun**
- Growth**
- Happiness**
- Honesty**
- Humor**
- Impact**
- Influence**
- Inner Harmony**
- Justice**
- Kindness**
- Knowledge**
- Leadership**
- Learning**
- Love**
- Loyalty**
- Meaningful Work**
- Openness**
- Optimism**
- Peace**

- Pleasure**
- Poise**
- Popularity**
- Recognition**
- Religion**
- Reputation**
- Respect**
- Responsibility**
- Security**
- Self-Respect**
- Service**
- Spirituality**
- Stability**
- Success**
- Status**
- Trustworthiness**
- Wealth**
- Wisdom**

**My # 1:**

---

**My # 2**

---

**My # 3**

---

### TABLE EXERCISE

- ✓ Take 5 minutes to review & circle your top 3 values
- ✓ Order them 1 – 2 – 3
- ✓ Share them & post them
- ✓ Hold ALL your decisions up to those 3 values for alignment



# Cultivate Your Story

Start with WHY

**“People don't buy what you do; They buy WHY you do it.” – Simon Sinek**

**“Your WHY is where your influence finds roots.” – Donna Miller**

By articulating your WHY with your Personal Mission, Values & Vision statement, you can build a powerful story that CONNECTS with your audience

*Time to Journal...*

## Why do you do what you do?

*NOTE: Money is a result, not a why. What can the money do for you?*

- What’s happened in your life that compelled you to choose this career?
- Where have you succeeded?
- Where have you failed?
- As you look back what are lessons or themes that keep showing up?
- As you look forward what are your “must haves”?

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

### **HOMEWORK ASSIGNMENT**

You’ve been given your industry’s lifetime achievement award!

**Write your 3 minute acceptance speech.**

Think BIG, think Oprah, think Academy Awards, think private jet to your own island

**Share with your accountability partner or your tribe**



# Time to Journal...

## My Story Notes

*Building on your WHY and your MVV, begin to write your story.*

### Beginning

*Clueless, insecure, naïve, rose-colored glasses. Make it okay for them to NOT be okay by modeling that – authenticity.*

---

---

---

---

---

---

---

---

---

---

### Middle (Pain)

*Your learning phase, all the pain you encountered, failures, what you tried. Does your pain mirror their pain? Be vulnerable. Be authentic.*

---

---

---

---

---

---

---

---

---

---



## **My Story (Continued)**

*Building on your WHY and your MVV, begin to write your story.*

### **“End” (Solution)**

*How you “fixed” it, shift from “have to” to “get to”, young at heart, confident*

---

---

---

---

---

---

---

---

---

---

### **Hook (Open Ended Questions)**

*I don't suppose ...*

*I'm sure this has never happened to you ...*

---

---

---

---

---

---

---

---

---

---



## Target Market – CLIENT AVATAR

*You cannot serve everyone – create your niche*

### DEMOGRAPHICS

Age: \_\_\_\_\_

Occupation: \_\_\_\_\_

Gender: \_\_\_\_\_

Income: \_\_\_\_\_

Marital Status: \_\_\_\_\_

Education Level: \_\_\_\_\_

Children/Ages: \_\_\_\_\_

Career Stage: \_\_\_\_\_

Location: \_\_\_\_\_

AUM: \_\_\_\_\_



### PSYCHOGRAPHICS

### LIFESTYLE

Values:

\_\_\_\_\_

Challenges:

\_\_\_\_\_

Pain Points:

\_\_\_\_\_

Why your service:

\_\_\_\_\_

\_\_\_\_\_

Goals (hopes & dreams):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do they travel?:

\_\_\_\_\_

What are their hobbies?:

\_\_\_\_\_

Do they read, if so, what?:

\_\_\_\_\_

What kind of car do they drive?:

\_\_\_\_\_

Do they own more than one home?:

\_\_\_\_\_

How do they gather data to make buying decisions?:

\_\_\_\_\_

Where do they frequent? Synagogue? Church? Gym?:

\_\_\_\_\_



## Target Market – COIs (Centers Of Influence)

Many will WANT to help, only a few WILL ... Find the RIGHT COIs

### DEMOGRAPHICS

Age: \_\_\_\_\_

Occupation: \_\_\_\_\_

Gender: \_\_\_\_\_

Income: \_\_\_\_\_

Marital Status: \_\_\_\_\_

Education Level: \_\_\_\_\_

Children/Ages: \_\_\_\_\_

Career Stage: \_\_\_\_\_

Location: \_\_\_\_\_

Size of Team: \_\_\_\_\_

### LIFESTYLE



### PSYCHOGRAPHICS

Do they travel?:

\_\_\_\_\_

Goals (hopes & dreams):

\_\_\_\_\_

What are their hobbies?:

\_\_\_\_\_

Values:

\_\_\_\_\_

Do they read, if so, what?:

\_\_\_\_\_

Challenges:

\_\_\_\_\_

What does their COI circle look like?:

\_\_\_\_\_

Pain Points:

\_\_\_\_\_

Do they belong to professional associations?:

\_\_\_\_\_

How did your collaboration begin?:

\_\_\_\_\_

What are their primary prospecting activities?:

\_\_\_\_\_

\_\_\_\_\_

### HOMEWORK ASSIGNMENT

Define your niche market and your ideal COIs.  
Track this data over time to refine your efforts.  
(Email me for our Client Analyst Excel Spreadsheet)





## Behavior Planning

There are endless ways to prospect. Doing too many is the surest way to fail at them all. Pick your primary activities and go deep. Pick activities that can leverage the other activities. And, measure results!

### Possible Prospecting Activities

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> LinkedIn                   | <input type="checkbox"/> Create & update email signatures with tag lines | <input type="checkbox"/> Marketing driven auto responders                                       |
| <input type="checkbox"/> Facebook                   | <input type="checkbox"/> Print Advertising                               | <input type="checkbox"/> Create sales templates   |
| <input type="checkbox"/> Twitter                    | <input type="checkbox"/> Radio Advertising                               | <input type="checkbox"/> Develop your open-ended questions (remember, selling is 70% listening) |
| <input type="checkbox"/> Blog                       | <input type="checkbox"/> Sponsoring Events                               | <input type="checkbox"/> Written referral plan  |
| <input type="checkbox"/> Vlog                       | <input type="checkbox"/> Web/banner advertising                          | <input type="checkbox"/> COI events and outreach  |
| <input type="checkbox"/> Internet article marketing | <input type="checkbox"/> Collaborative events                            | <input type="checkbox"/> Strategic Partnerships   |
| <input type="checkbox"/> 1 to 1 prospecting         | <input type="checkbox"/> Niche marketing campaigns                       | <input type="checkbox"/> Trade Shows & Exhibits   |
| <input type="checkbox"/> Webinars                   | <input type="checkbox"/> Direct mail (buying lists)                      | <input type="checkbox"/> Public speaking  |
| <input type="checkbox"/> Seminars                   | <input type="checkbox"/> Sales promotions items                          | <input type="checkbox"/> Cold calling   |
| <input type="checkbox"/> Networking                 | <input type="checkbox"/> Contests  | <input type="checkbox"/> Review meetings  |
| <input type="checkbox"/> Workshops                  | <input type="checkbox"/> Non-profit support                              |   |
| <input type="checkbox"/> Social Gatherings          | <input type="checkbox"/> Develop stories                                 |   |
| <input type="checkbox"/> Golf                       |  |   |

#### TABLE EXERCISE

- ✓ Take 5 minutes to start your list of prospecting activities
- ✓ Go around the table and share some of what you are doing that IS driving results.
- ✓ Be specific.

---

---

---

---

---





## Focused Behavior Planning

*Going back to your One Page Business Plan...*

➤ What is your Revenue Goal?

---

---

➤ How far are you from that goal?

---

---

➤ How many and what type of clients do you need to bring in to achieve that goal?

---

---

---

➤ Go to your Prospecting Notes – how / do these answers affect your top 3-4 prospecting activities?

---

---

---

---

---



## SAMPLE Strategic Planning

### **PRIORITY #1: *Get Strategic***

Behavior #1 – Block time each week to work on strategy

Behavior #2 – Create story library

Behavior #3 – Learn more about Smart Office & Practice Development tools

Behavior #4 – Build my Tribe/Find an accountability partner

### **PRIORITY #2: *Create COI Strategy***

Behavior #1 – Analyze current COIs

Behavior #2 – Develop list of 15 potential COIs

Behavior #3 – Document how we can work together

Behavior #4 – Nurture existing COIs

### **PRIORITY #3: *Leverage Thought Leadership (Influence)***

Behavior #1 – Meet with existing COIs to explore collaborative speaking

Behavior #2 – Deliver, Sponsor, Host or Moderate Seminars

Behavior #3 – Organize 4-somes

Behavior #4 – Connect complimentary COIs

### **PRIORITY #4: *Drive Referrals via Networking***

Behavior #1 – Develop strategy to ask for referrals

Behavior #2 – Create In-Person Networking Strategy

Behavior #3 – Create Online Networking Strategy (LinkedIn)

Behavior #4 – Become a Go-To Resource



## MY Strategic Planning

Based on my Revenue Goal of \_\_\_\_\_

**PRIORITY #1:** \_\_\_\_\_

Behavior #1: \_\_\_\_\_

Behavior #2: \_\_\_\_\_

Behavior #3: \_\_\_\_\_

Behavior #4: \_\_\_\_\_

**PRIORITY #2:** \_\_\_\_\_

Behavior #1: \_\_\_\_\_

Behavior #2: \_\_\_\_\_

Behavior #3: \_\_\_\_\_

Behavior #4: \_\_\_\_\_

**PRIORITY #3:** \_\_\_\_\_

Behavior #1: \_\_\_\_\_

Behavior #2: \_\_\_\_\_

Behavior #3: \_\_\_\_\_

Behavior #4: \_\_\_\_\_

**PRIORITY #4:** \_\_\_\_\_

Behavior #1: \_\_\_\_\_

Behavior #2: \_\_\_\_\_

Behavior #3: \_\_\_\_\_

Behavior #4: \_\_\_\_\_



## Strategic Execution - SAMPLE

*Based on a goal of XX% increase in revenue*

### **ANNUALLY, I WILL...**

1. Meet with my top 20 clients (upsell, ask for referrals)
2. Email remaining clients to schedule check in calls (use appointment setting tool like TimeTrade)
3. Bring on 4 more COIs
4. Deliver 4 seminars

### **MONTHLY, I WILL...**

1. Attend 4 in person networking events
2. Spend 8 hours online networking (Linked In)
3. Spend 8 hours working on messaging, story, speaking
4. Spend 4 hours exploring how to work smarter with Practice Dev Tools

### **WEEKLY, I WILL...**

1. Schedule 5 prospect meetings
2. Make 20 calls to prospects, potential COIs, networking follow up
3. Ask for referrals 10 times
4. Review Strategic Plan & time block execution

### **DAILY, I WILL...**

1. Work on Confidence Practice
2. Seek to give referrals
3. Practice active listening
4. Have fun



## Strategic Execution

Based on a goal of: \_\_\_\_\_

### ANNUALLY, I WILL...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### MONTHLY, I WILL...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### WEEKLY, I WILL...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### DAILY, I WILL...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_



## Go the Distance

- What will your “Confidence Practice” look like?

---

---

---

- What tools will you use?

---

---

---

- My Affirmations (I am vs I will statements)

---

---

---

- Who can be my accountability partner?

---

---

---

- Who do I want as part of my tribe?

---

---

---





## Recommended Reading & Resources:

*Start with Why* – Simon Sinek

How Great Leaders Inspire Action – Simon Sinek TED Talk Video

*The Go-Giver* – Bob Burg & John David Mann

*The One Thing* – Gary Keller with Jay Papasan

The One Thing Podcast

*Good to Great* – Jim Collins

*The E-Myth* – Michael Gerber

*Girl Stop Apologizing* – Rachel Hollis

RISE Podcast (Rachel Hollis)

*The Four Agreements* – Don Miquel Ruiz

*Untamed* – Glennon Doyle

*The 4 Hour Work Week* – Tim Ferris

What will your professional development and reading goal be for this year?

---

---

---

---

---

---

---

---

---

---