



PLANNING INTENSIVE

NOVEMBER 2022





12 MONTH REVIEW

LIST MY BIGGEST BUSINESS & LIFE
ACHIEVEMENTS FROM 2022

BUSINESS

LIFE



12 MONTH REVIEW

WHAT ACTIVITIES HELPED ACHIEVE
THESE RESULTS?



12 MONTH REVIEW

WHAT COULD I HAVE DONE BETTER
OVER THE LAST 12 MONTHS?

BUSINESS

LIFE



12 MONTH REVIEW

WHAT WORKED OVER THE LAST 12 MONTHS THAT I WILL CONTINUE DOING?

BUSINESS

LIFE



12 MONTH REVIEW

WHAT DIDN'T WORK OVER THE LAST 12 MONTHS THAT I WILL STOP DOING?

BUSINESS

LIFE



12 MONTH REVIEW

WHAT WILL I START DOING OR IMPROVE
ON IN THESE NEXT 12 MONTHS?

BUSINESS

LIFE



12 MONTH REVIEW

WHAT MOMENTS BROUGHT ME THE MOST
JOY IN THE LAST 12 MONTHS?

BUSINESS

LIFE



12 MONTH REVIEW

WHAT MOMENTS BROUGHT ME THE MOST FRUSTRATION
OR DISAPPOINTMENT OVER THE LAST 12 MONTHS?

BUSINESS

LIFE



12 MONTH REVIEW

WHAT WERE THE BIGGEST LESSONS I
LEARNED IN THE LAST 12 MONTHS?

BUSINESS

LIFE



12 MONTH REVIEW

WHAT ARE THE 3 THINGS I'M MOST PROUD OF
ACHIEVING OVER THE LAST 12 MONTHS?

BUSINESS

LIFE



LIFE AUDIT

SURVIVING OR THRIVING

CATEGORY

SURVIVING OR THRIVING

HEALTH & WELL-BEING

FAMILY & FRIENDS

ROMANCE

PERSONAL GROWTH

PHYSICAL ENVIRONMENT

BUSINESS/CAREER

FINANCES

FUN & RECREATION



HEALTH & WELLBEING

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



FAMILY & FRIENDS

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



ROMANCE

WINS

HOPES & DREAMS



ROMANCE

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



PERSONAL GROWTH

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



PHYSICAL ENVIRONMENT

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



BUSINESS/CAREER

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



FINANCES

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



FUN & RECREATION

WINS

HOPES & DREAMS



FUN & RECREATION

GOAL

TIMELINE

ACTION STEPS

ONE

TWO

THREE



CHANGE YOUR MINDSET!

LIMITING BELIEFS VS. LIBERATING TRUTHS:
YOU CAN IMPROVE YOUR BELIEFS

**WE HAVE ALL HAD LIMITING BELIEFS LIKE THE
FOLLOWING AT ONE TIME OR ANOTHER**

"I don't have enough experience."
"I can't write."
"I always quit."
"I'm terrible with technology."
"I'm not good with money."
"I've hit the ceiling in my career."
"I'm not self-disciplined."
"I'm not creative."
"I'll never repair that relationship."
"I'm not smart enough."
"I always fail sooner or later."
"I'll never be able to bounce back from
this failure."



HOW TO IMPROVE YOUR LIMITING BELIEFS



1. RECOGNIZE THE LIMITING BELIEF
2. RECORD THE BELIEF
3. INTERROGATE THE BELIEF
4. REJECT OR REFRAME THE BELIEF
5. REVISE THE BELIEF
6. REORIENT YOURSELF TO THE NEW BELIEF



CHANGE YOUR MINDSET!

LIMITING BELIEFS VS. LIBERATING TRUTHS:
YOU CAN IMPROVE YOUR BELIEFS

TEAM	LIMITING BELIEFS		LIBERATING TRUTHS	
TEAM	Example: My team is not onboard with the new DSOA system I am trying to implement.		Example: My team needs better training on the new DSOA system that I want to implement and the reason why we are implementing it.	
CUSTOMER	Example: My parents will not pay more for my classes that are offered.		Example: My parents need to understand the value that my studio provides so that they will be onboard with my price increases.	
SELF	Example: I will never be able to make more money.		Example: In order to make more money I need to create a plan with my accountant.	



LIFE GOALS FOR 2023 CALENDAR

JANUARY

FEBRUARY

MARCH

APRIL



LIFE GOALS FOR 2023 CALENDAR

MAY

JUNE

JULY

AUGUST



LIFE GOALS FOR 2023 CALENDAR

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER



MY IDEAL DAY MY DAILY VISION FOR 2023

THINK ABOUT...

- Where would you be?
- Who would be with you?
- What would you be doing?
- What wouldn't you be doing? (and then leave this out!)
- How would you feel?
- What steps do you need to take to start making this more of a reality?



MY IDEAL DAY MY DAILY VISION FOR 2023

THINK ABOUT...HEALTH & WELLBEING, FAMILY & FRIENDS,
ROMANCE, PERSONAL GROWTH, PHYSICAL ENVIRONMENT,
BUSINESS/CAREER, FINANCES AND FUN & RECREATION



AN ACTION PLAN FOR THE OVERWHELMED

ACTION 1: FOCUS ON YOUR HIGHEST-LEVERAGE WORK

The secret to ending the overwhelm is to do less, not more.

ACTION 2: IDENTITY YOUR THREE BIGGEST PRODUCTIVITY SINKHOLES

Your productivity sinkholes are the things that consume maximum resources and produce minimum results.

ACTION 3: SCHEDULE YOUR MOST IMPORTANT TASKS

In many studios, the workday is consumed by teaching, costume ordering and creating marketing on Canva. That means people must do their “real work” in the evenings or on weekends. No wonder they’re overwhelmed. One way to break that cycle is to schedule your tasks, not just your teaching or admin time. Remember, what gets scheduled gets done.

QUARTERLY DEEP DIVE GOALS



30 DAY PLANNING MONTHLY GOALS



“MAP OUT YOUR” WEEKLY GOALS



DAILY BIG 3



7 GREAT HABIT TRACKING APPS

1 STRIDES: stridesapp.com

- Beautiful layout with eye-catching and accessible graphs
- Different types of trackers (i.e., target tracker, habit tracker, average tracker)
- Set streak goals for knocking out 30-day challenges
- Customize habit goals as “yes or no”
- Enjoy multiple other customization options

2 COACH.ME: coach.me

- Cultivate community as you track your habits
- Create plans and share them with your connections
- Join plans created by others
- Integrate a personal coaching feature at an affordable cost

3 HABIT LIST: habitlist.com

- Track habit streaks
- Create flexible schedules
- Set habits to specific days, non-specific days or intervals
- Use the skip feature for habits when you are on vacation or just want a break

4 HABITICA: habitica.com

- Inspired by RPG video games
- “Gamifies” habit tracking and keeps it fun
- Level up your customized avatar as you make progress with your habit goals
- Partner with friends for quests and missions

5 HABITIFY: habitify.me

- Simple and attractive interface
- Build prioritized lists of habits and check them off as you complete them
- Engage with numerous graphs and charts about your habit progress
- Strictly for iOS, but can be easily synchronized across all iOS devices

6 DONE: treebetty.com

- Slick and simple habit tracker strictly for iOS
- Multiple customization options
- Track habits you want to build and quit
- Take notes about your habit progress in a Daily Journal
- Group habits into categories for easier navigation

7 HABITBULL: habitbull.com

- A feature-rich habit tracker
- Detailed recording options including detailed feedback about your progress
- Fitness habits can be integrated with GoogleFit
- All data can be backed up on the cloud



STUDIO SUCCESS PLAN

CLASS CURRICULUM & PROGRAMS:

Your offering and how you generate income inside your studio.



YOU & YOUR TEAM:

Your people (teachers and office staff) are one of the biggest assets you have inside your business. By now you know that you can't build your dream dance studio on your own, hence it's crucial you have the right people in the right roles.



STUDENT ATTRACTION & RETENTION:

Marketing does for your dance studio what oxygen does for human beings.... Keeps us alive and ideally thriving. It's no secret that sales and marketing go hand in hand inside your studio and as the CEO of your studio, you need to be focusing at least 40% of your time each week on this pillar of the business. Without focusing on bringing in constant new student leads, enrolling students, retaining them and offering them more to do inside your studio then your business is not where it could be and if that's the case, this plan is going to change that.



OPERATIONS & EXECUTION:

While creating systems and support structures is not the most creative aspect of running a dance studio they are crucial for any studio owner who wants to scale their business. It's impossible to take a studio from 200 to 600 to 1000 students without core structures being put in place around administration, outsourcing, communication, meetings, hiring, project management etc.



FINANCES:

Knowing exactly where our business is at financially is more than important, it's a must (not negotiable). Generally this pillar is also way down at the bottom of our to-do list as it doesn't come naturally for us to look at numbers, understand them and then make decisions based on what the dollars (or pounds) are telling us.



YOUR 12 GOALS FOR 2023

GOAL	PRIORITY (1-12)
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____
11. _____	_____
12. _____	_____



2023 GOALS IN QUARTERS

JANUARY, FEBRUARY & MARCH

GOAL

DATES

1. _____
2. _____
3. _____

APRIL, MAY & JUNE

GOAL

DATES

1. _____
2. _____
3. _____



2023 GOALS IN QUARTERS

JULY, AUGUST & SEPTEMBER

GOAL

DATES

1. _____
2. _____
3. _____

OCTOBER, NOVEMBER & DECEMBER

GOAL

DATES

1. _____
2. _____
3. _____



MONTHLY GOALS

JANUARY

GOAL

DATES

1. _____
2. _____
3. _____

FEBRUARY

GOAL

DATES

1. _____
2. _____
3. _____

MARCH

GOAL

DATES

1. _____
2. _____
3. _____



MONTHLY GOALS

APRIL

GOAL

DATES

1. _____
2. _____
3. _____

MAY

GOAL

DATES

1. _____
2. _____
3. _____

JUNE

GOAL

DATES

1. _____
2. _____
3. _____



MONTHLY GOALS

JULY

GOAL

DATES

1. _____
2. _____
3. _____

AUGUST

GOAL

DATES

1. _____
2. _____
3. _____

SEPTEMBER

GOAL

DATES

1. _____
2. _____
3. _____



MONTHLY GOALS

OCTOBER

GOAL

DATES

1. _____
2. _____
3. _____

NOVEMBER

GOAL

DATES

1. _____
2. _____
3. _____

DECEMBER

GOAL

DATES

1. _____
2. _____
3. _____



SWOT

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS



ANNUAL STUDENT ATTRACTION + RETENTION GOALS

WHAT	JAN	FEB	MAR	APR	MAY	JUNE
LEADS						
TRIALS						
ENROLLED						
RETENTION						

WHAT	JUL	AUG	SEP	OCT	NOV	DEC
LEADS						
TRIALS						
ENROLLED						
RETENTION						

TOTAL

L		T		E		R	
---	--	---	--	---	--	---	--

GOAL: _____



MONTH: _____

STUDENT ATTRACTION PLAN

OFFER: _____

AGE GROUP	CLASS	STUDENT
PARENT	TEACHER	STUDIO

STANDOUT STATEMENTS

1	
2	
3	
4	

HEADLINES

1	
2	
3	
4	

DISTRIBUTION CHANNELS

BUDGET

GOAL: _____



MONTH: _____

STUDENT ATTRACTION PLAN

OFFER: _____

AGE GROUP	CLASS	STUDENT
PARENT	TEACHER	STUDIO

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DISTRIBUTION CHANNELS

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DISTRIBUTION CHANNELS

BUDGET

GOAL: _____



MONTH: _____

STUDENT ATTRACTION PLAN

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1	
2	
3	
4	

HEADLINES

1	
2	
3	
4	

DISTRIBUTION CHANNELS

BUDGET



BEYOND STUDENT ATTRACTION

	YEARLY RETENTION STRATEGIES	BOOSTING CLASS PLACES
JAN		
FEB		
MAR		
APR		
MAY		
JUN		
JUL		
AUG		
SEP		
OCT		
NOV		
DEC		



ROADMAP

	GROWTH			FREEDOM			EMPIRE		
	Attract	Enroll	Retain	Plan	Systemize	Profit	Communicate	Grow	Mentor
ON-RAMP	The Enrollment Process			Class Capacity Forecast Studio Success Plan 3 Year Vision 12 Month Plan Your Next 90 Days		Financial Clarity			
YEAR 1	Marketing Plan Paid Advertising Customer Journey Mapping New Student On-Boarding	Re-Enrollment & Engagement		Project Planning		Revenue Streams Budgeting	Mission & Core Values Hiring Process		
YEAR 2	Out of the Box Marketing	Customer Experience Retention Start Up		Goal Setting	Systems Playbook	Profit First	Building a Knockout Brand Organizational Chart Staff Performance Team Onboarding		
YEAR 3	Copywriting Crash Course			Automation			Streamlined Communication Productivity Training Marketing Analysis Time Management Crisis Management		

In addition to the cards listed above, you will also have access to an implementation card and for Premier Members a Game Plan card annually.



ON RAMP

WHY IT MATTERS

ENROLL

The Enrollment Process

You and your team will all be on the same page dealing with (and converting) new enquiries efficiently and effectively.

PLAN

Class Capacity Forecast

You will be able to identify the most and least profitable:

- Classes
- Teachers
- Dance styles

PLAN

Studio Success Plan

Use this assessment tool to identify your gaps and growth opportunities to set you up for success beyond the On-Ramp.

PLAN

3 Year Vision

You'll unlock a clearly defined and descriptive picture of who you will become and what you will have accomplished in business and life over the next 3 years, which will allow you to work less in your business and more on your business.

PLAN

12 Month Plan

You'll have clear goals in place so that each month, you know exactly what to do to move your studio forward.

PLAN

Your Next 90 Days

Leave our signature 90-Day Deep Dive training session with clarity and a roadmap for your next quarter in business.

PROFIT

Financial Clarity

Gain clarity on the critical aspects that underpin the financial management of your dance studio.



YEAR ONE

WHY IT MATTERS

ATTRACT

Marketing Plan

You'll gain confidence and clarity in laying out the 3 pillars of your student attraction marketing plan to ensure you can attract, enroll and retain dancers year-round.

ATTRACT

Paid Advertising

Using Paid Advertising, your ability to target a specific audience is exponentially increased. More accuracy equals more enquiries, which in turn equals more enrollments.

ATTRACT

Customer Journey Mapping

You and your team will have a clear map of the steps your customers take - starting with when they learn about you, all the way to enrolling in your studio.

RETAIN

Re-Enrollment & Engagement

You and your team will all be on the same page when it comes to planning and executing consistent strategies to increase re-enrollment and engagement of your dancers as you transition into each new season.

RETAIN

New Student On-Boarding

Did you know it costs seven times more to enroll a new student than it does to retain an existing student? This is why it's vital that you have an onboarding system in place as part of your retention strategy to ensure that your studio continues to grow!

PLAN

Project Planning

You'll solve a repeated business issue in a strategic and effortless way. Efficient Project Planning will ensure that you prioritize key projects and spend quality time working 'ON' the business rather than solely 'IN' the business.

PROFIT

Revenue Streams

You'll learn how to establish additional streams of income that allow you to invest more in your studio and contribute to its growth. You may even stumble onto a new, more profitable direction for your business!

PROFIT

Budgeting

You'll have the tools to manage your studio's financial position more effectively and ensure your future plans are achievable.

GROW

Mission & Core Values

You will set a compass for what long-term success means to you and ensure that you and your team achieve it in alignment with your core values.

GROW

Hiring Process

You'll hire the right people for the right roles who align with your core values and studio culture for long-term success.



YEAR TWO

WHY IT MATTERS

ATTRACT

Out of the Box Marketing

You and your team will have a clear marketing plan that targets the right demographic for your goals and fills the classes you are targeting.

RETAIN

Customer Experience

We are now in the “experience” economy. What the customer wants is an experience that they can't get anywhere else, and that's what I'm going to share with you - how to give it to them. These are the little things you do weekly and monthly that cost you nothing yet make the customer feel like they are the only person at your studio.

RETAIN

Retention Start Up

You and your team will all be on the same page when it comes to planning and executing consistent strategies to increase retention of your dancers while also ensuring they are advocates and raving fans of your business.

PLAN

Goal Setting

You'll learn how to set effective goals for business success so that every day you are moving closer to your dream dance studio.

SYSTEMIZE

Systems Playbook

A system is a method of solving a repeated business issue in a strategic and effortless way, and by executing the Systems Playbook training you'll have everything you need to say 'goodbye' to all of your tasks that can be systemized.

PROFIT

Profit First

You will look at the critical aspects that underpin the financial management of your dance studio and set up a plan to increase profit and financial security.

GROW

Building a Knockout Brand

Your brand is so much more than your logo or your signage. Your brand as a dance studio needs to sum up all of the experiences your dancers, their families, and your potential dance families have or WILL have with your studio. A strong brand communicates what your studio does, how it does it, and at the same time it establishes trust and credibility.

GROW

Organizational Chart

You'll have the tools to manage your team and succession plan more effectively and ensure your future goals are achievable.

MENTOR

Staff Performance

You will create an overall assessment that helps your team members to prioritize. Employees will learn what their key strengths are and where they should focus their development efforts.

MENTOR

Team Onboarding

You will integrate new employees into your studio and ensure they are provided with the knowledge, training, and support they need to become productive members of the team.



YEAR THREE

WHY IT MATTERS

ATTRACT

Copywriting Crash Course

Writing great sales copy will motivate your prospective customers to take action. Whether that action is to: enroll into an existing class, upgrade into a multi-class package, pre-book for recital tickets, sign up as a strategic partner, to join your mailing list, or publicize an event.

SYSTEMIZE

Automation

Automation technology makes the administrative work in your studio more efficient, so the most valuable resources (your staff) can focus on the big-picture tasks and projects that matter most in your business.

COMMUNICATE

Streamlined Communication

Restructuring your communication strategy from the ground up will offer you, your team and the studio measurable improvements in productivity, student retention and customer satisfaction.

GROW

Productivity Training

Improving your productivity will not only free up your schedule to spend more time and resources on growing your studio, but will also empower you to spend more quality time with your friends, family and give you the much needed 'down-time' that is critical in avoiding overwhelm and burnout.

GROW

Marketing Analysis

Having a marketing plan that doesn't work is worse than not having one at all. If you're not measuring your results and whether they return the cost, then you very well could be throwing your money away. These resources offer several ways to tell if your marketing is working, and the best methods will differ based on each of your goals.

GROW

Time Management

The most successful dance studio owners lead by example. The values and work ethic that you display has a direct influence on your studio culture, and many times, on your profitability. Time management improves the efficiency and effectiveness of your studio while simultaneously decreasing stress and conflict for all team members.

GROW

Progression Planning

A progression plan is a clear and intentional plan for your businesses growth opportunities. This should lay out a clear pathway including your plans for growth, scaling, mergers & acquisition, and sale/transfer of business that you can reference to plan and observe progress.

GROW

Crisis Management

A crisis can take many forms and can lead to tangible and intangible costs to a dance studio in terms of lost income, reputation damage, staff turnover, and the strains of recovery. Dance studios that put a plan in place in case of crisis are in the best position to mitigate these effects.

MENTOR

Team Retreat System

Running successful team retreats will provide invaluable opportunities for your staff to step back from the day-to-day tasks, and gain a new perspective on communication, teamwork, and big-picture planning.

MENTOR

Personality Testing

You'll finally be empowered to hire and organize your highly effective team using unbiased testing that uncovers natural strengths and innate abilities.



RESOURCES

OPERATIONS / EXECUTION

- Asana tutorial - [click here](#)
- Trello Tutorial - [click here](#)
- Re-opening Roundtable - [click here](#)
- Time-Management Pro Class with Neen James - [click here](#)
- Automation Workshop - [click here](#)
- Fiverr - [click here](#)
- Active Campaign Tutorial - [click here](#)
- iStock Stock Images - [click here](#)
- Project Management Video Training - [click here](#)
- Project Management Templates - [click here](#)
- Canva (graphic design site) - [click here](#)
- Communication Supershare with Annie Thistle - [click here](#)

YOU & YOUR TEAM

- Hiring Funnel - [click here](#)
- Org chart - [click here](#)
- Where to find great teachers - [click here](#)
- Teacher Recruitment - [click here](#)
- Staff Dismissal Process - [click here](#)
- Team Onboarding System - [click here](#)
- Leadership Training 1 - [click here](#)
- Leadership Training 2 - [click here](#)
- Job Description - [click here](#)
- Michel Falcon Retreat Session (culture) - [click here](#)
- Plies To Profits Podcast - Delegation / Empowerment - [click here](#)

FINANCE

- Introduction to Profit First with Shannon Simmons - [click here](#)
- Finance Model - [click here](#)

- Pricing Office Hours with Hillary - [click here](#)
- Class Capacity Forecast - [click here](#)

STUDENT ATTRACTION & RETENTION

- Student Attraction / Marketing training - [click here](#)
- 11 Step Enrollment Process - [click here](#)
- Studio Growth Masterclass - Onboarding (Amanda and Lisette) - [click here](#)
- 6-Week Onboarding System - [click here](#)
- Facebook Ads Training - [click here](#)
- Customer Journey Training - [click here](#)

CLASS CURRICULUM & PROGRAMMING

- Performance Team Podcast - [click here](#)
- Stacy Tuschl Retreat Session - [click here](#)
- Prestige Dance Supershare - [click here](#) (video) and [click here](#) (presentation)

INNER CIRCLE PLANNING

- IC Google Calendar - [click here](#)
- 90 Day Plan with Clint - [click here](#)
- Book a Momentum Call - [click here](#)
- IC Facebook Group - [click here](#)

HANDBOOKS

- 1/ Teacher / Faculty - [click here](#)
- 2/ Parent / Student - [click here](#)
- 3/ Recital - [click here](#)
- 4/ Covid Re-Opening Handbook - [click here](#)
- 5/ Virtual Studio Handbook - [click here](#)