

# Course Correction

Mid-year  
Strategic  
Planning

by

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Own your *dreams* without selling your soul™

## **Course Correction: Mid Year Strategic Planning**

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# Welcome!

## GET BACK ON THE SUCCESS TRACK

### Introduction

Hello! This is Lisa Robbin Young and welcome to **Course Correction:** *Mid-year strategic planning to set yourself up for a Happy New Year.*

This is our monthly training for my Accountability Club members. They are a courageous bunch of creatives, defining success on their own terms. If you're not already a member, it is because of them that YOU get to listen live at no cost, so a big thanks to them for sponsoring today's training. You can learn more about A-club at [lisarobbinyoung.com/aclub](http://lisarobbinyoung.com/aclub).

It's officially Summer, here in the northern hemisphere, and that means it's time for the annual schedule shift that comes when kids and summer demands ramp up. It's also the time of year that many creatives look back on the first half of the year and wonder to themselves, "what the heck happened? Where'd the year go?"

BOTH my boys are in Nashville. Forest is preparing to start recording engineering school this fall. Liam is off school for the summer, I've spent the whole year getting ready for this!



In fact, my major goal this year was to essentially take the entire summer off and be fully present with my kids. I've never taken a 2.5 month vacation before, and I haven't fully stepped away from my business. I'm still leading these classes and working with my current clients. So I'm not completely gone, but I've stripped everything WAY back.

We're only a week in, so I'll keep you posted on how much of my sanity I have left by the end of Summer, but so far, so good.

Many creatives hit this time of year and are either burned out from working too hard (Linears, I'm looking at YOU!), or frustrated thinking they should be farther along than they are (Chaotics, that's you!). Sometimes, you can be Zen about it and trust that things are going to work out, but often, there's some head scratching, trying to figure out what to DO differently to get things back on track (and if you're a Fusion, DO-ing is standard operating procedure).

And no, I'm not immune to this either. As a Fusion creative, I can get stuck in the Artisan trap and feel the push and pull of both the Linear "GO GO GO!" and the Chaotic "Are we there yet?" I can make a lot of progress and not FEEL like I'm making any progress.

So I get it. Believe me, I do. We often teach the thing we most need to learn.

### **How do you get back on track when things go off the rails?**

If 2017 hasn't panned out the way you wanted it to, and you'd like some help making a strategic plan for greater success in the second half of the year, you are in the right place. And if 2017 is going well and you want to stay on a growth track, this session should also be helpful to you.

Today you'll discover:

- **How your "creative blind spot" might be responsible for stalling your progress this year**



- **A simple way to get back on track for 2017** - and set yourself up for a fabulous 2018
- **The only tool I've used for the past 5+ years** to set and achieve my most important goals
- and the proverbial "more"

I always open up the lines for Q&A if time permits, so if questions or ah-has come up for you during our time together, I hope you'll share them with us at the end.

So grab your notebooks, pencils and beverage of choice, turn off your distractions, and let's dig in.





# CREATIVE BLIND SPOTS

## Stalling Your Growth Unintentionally

This past week I updated the free report that you get when you take my creative freedom quiz. If you've already taken it, you know your creative type – from the very Linear to the very Chaotic and the Fusions in between.

When I updated the document, I also added a more detailed chart for each type that illustrates how your strengths can also become your blind spots in growing your business. Each type has their ninja skills, and they can quickly turn into blind spots if they are left unchecked. Let's look at each type now and see if something here triggers a deeper understanding of what's been slowing you down.

**Chaotics have incredible vision**, and can paint a huge picture of what they want to accomplish. They have high standards of excellence and know how to create an exceptional experience for their audience. They can be highly intuitive and that intuition – that “gut instinct” is usually right on the money. These are all powerful ninja skills for a Chaotic creative.

On the other hand, those visionary ideas and plans often remain in your head, making you the bottleneck in the business. You know what you want to achieve, but haven't articulated it effectively to your team, so you're stuck. Likewise, those high standards can



quickly devolve into perfectionism and stalling until something is “just right” before it gets put out into the world. Your desire to create an exceptional experience can have you overspending, running over budget and, when coupled with perfectionism, have you running behind schedule to boot.

That's when the “are we there yet?” energy starts kicking in – or more accurately the “WHY aren't we there yet?” energy. You are very clear that you haven't met your own expectations, but you're not sure why.

So let's see if we can unpack this and show you how it looks to the rest of the world.

Here's this Chaotic creative that keeps saying they have this big goal, this big plan, this big vision for something, but they haven't communicated the full scope of it to their team. Your team is on board, but doesn't have clarity on how to move forward. So EVERYTHING still has to run through your fingers before they can act on it. That's you, bottle-necking the business. Your team isn't empowered to get the work done, and maybe you're not feeling comfortable trusting them to make those decisions. If they're new to your team, that's understandable, you don't want to rush that transition of power. But at some point that transition has to happen. You need to empower and trust your team to run with your vision. But you ALSO have to communicate the full scope of that vision to them.

It's like saying “I want to throw an amazing party. Let's have a big cake with lots of decorations!”

That's great, but your team can't move forward because you haven't defined what “amazing” means. What “big cake” means. What “lots of decorations” means.

In other words, they don't know your definition of success.



"Okay," I hear you say "I want a big chocolate cake with sprinkles. And balloons. LOTS of balloons."

Great! Your team goes out and buys two huge balloon arches and a chocolate sheet cake with white frosting and sprinkles.

But you wanted a chocolate layer cake big enough for some hot dude to jump out of. And balloon arches aren't your jam. You wanted the ceiling covered in a rainbow of colored balloons.

### **Are you starting to see the problem here?**

You have a clear vision in your mind, but you've got to get it out of your mind and documented in a way that your team can act on – even if the only person on your team is you. Why? Because it's easy to compromise on your vision if you don't document it.

"Well, I'll settle for balloon arches even though they're not my jam."

Um. no. Take it from someone who knows, every time a Chaotic "settles" or compromises their vision, they are NOT happy.

There's a difference between settling and consciously making alternative choices. It may sound like semantics, but it's not.

Your brain hears the two things differently. Your brain records them differently. One is empowering, the other makes you miserable.

You can't just say "I want to make \$10,000 per month." That's great, but you've got to be clear on how that's going to happen. And if you're NOT clear on how that's going to happen, you have to be open to exploring options, having conversations, and GETTING clarity – all of which take time.





It's also easy to keep raising your bar if you haven't documented your vision. I know a woman who began the year saying success would be making \$5k per month, and has been slowly raising the bar all year without laying a clear plan in place to make it happen, just getting frustrated with herself when another month goes by and she hasn't hit that goal. Never mind the fact that she's doing much better this year than she did last year. Never mind the fact that she's very close to hitting her original goal and working less in the process. But because she didn't take the time to actually document and hold herself accountable to her original vision, she can't celebrate the growth she's already experienced.

And if you've never heard me say it before, hear it now: if you can't celebrate the small progress you're already making, if you keep "not-enoughing" your progress, you'll be hard-pressed to ever achieve what really matters to you because you'll be too busy not-enoughing everything you're doing to achieve it.

What about that powerful intuition? Well, remember, I said it's USUALLY on target. But I've never met anyone with 100% accuracy. And it's those instances, where you've acted on a hunch without checking in with the bigger picture of your business that Chaotics can find themselves asking "what did I get myself into?" making costly mistakes that could have been avoided had they slowed down to get confirmation on their hunch.

Checking in doesn't mean NOT following your gut. It just means double checking. Sometimes we misunderstand. Sometimes we're excited for all the wrong reasons. Sometimes the opportunity being presented is meant to be a trigger for something else.

My Incubator is a great example. It was a dream of mine to build a physical location where creatives could work together and grow their businesses. Way too big a vision for where I'm at right now. So I tabled the idea. Then, I had a friend who was working in a school district and wanted to launch his own business. He approached me about helping him, and I developed a proposal outlining how I could use my skills and abilities inside his business to get it off the ground.



He then lost his job and rejected my proposal.

"DEAR GOD! WHAT IN THE WORLD DID I DO ALL THAT WORK FOR!?! I trusted my gut and got bupkes! What did I get myself into?"

Lucky for me, the vision for the Incubator reformed in my mind a short time later. This time, in a virtual format, and the hours I spent developing that proposal for my friend ended up being almost exactly what I used for the first cohort of Incubator clients.

Had I kept my eye on working with my friend – the way I envisioned it "should" be, I would have missed out on something so much bigger with the Incubator. I had to check in with my original vision and get clear about why it was so appealing. Why was I willing to do all that work? It was never about working with my friend, but rather opening up a door that would have stayed closed had he not shown up.

So yes, trusting your gut can still work out. I believe that fully. I also believe that if I hadn't been willing to check in with the bigger picture of what I'm on this planet to do, I would still be angry with my friend, and frustrated by my lack of growth.

Vision is powerful, but without an audience and a team to bring it to fruition, your vision can't make the impact it's meant to bring to the world. That means trusting others with the specific details and letting them get to work on that six foot double chocolate cake with sprinkles and a hot dude inside just waiting to jump out and party!

**Linears, on the other hand have an eye for details,** can spot even tiny errors from a mile away, and aren't afraid to tell you all about it. They're results-oriented and great at developing systems and processes to keep things running like a well-oiled machine. They can be good innovators and problem solvers, finding patterns and solutions that seem obvious to them, but are illusive to others.



The double-edged sword here for Linears is that they often miss the bigger picture because they're too focused on the details. Being too bottom-line focused can cause you to cut corners that feel superfluous in the moment, but actually help the long-term stability and momentum of your project.

And while systems and processes are great, they are only great when they work... which takes time to figure out. If you're just starting something, or you've only done it once or twice, you don't have enough iterations under your belt to know if a system will work. Forcing people to stick to the system will only make you come across as too rigid, too inflexible, and you'll run the risk of alienating your team. It's easy to get too granular too soon because you've been building contingencies for your contingencies. As an innovator, you're two to three steps ahead of everyone else, so while it seems that what you're asking for is completely reasonable to you, everyone around you thinks you're asking for the impossible.

That's when it's easy to get frustrated with your team – again, even if you're just a team of one. You not only see the future, you're already living in it in your mind. You know what needs to happen to get there, and you've already told everyone else. You're just waiting for them to catch up.

Here's an example from one of my former clients. He is an incredibly successful author and mentor, with a huge mailing list. We worked together to develop an online coaching program built around his intellectual property. It was a 15 month program. His job was to compile the content, and he had a team of designers to build out and develop the delivery of the content. My job was to oversee the work, interface with the coaching clients and actually BE the coach when clients needed one-on-one support.

He did a great job of spreading the word about the program and on launch day, we added nearly 800 people to the program. Logic would dictate that I need to be present to meeting the needs of the customer, right? Doing welcome calls, getting orientation han-





dled, and making sure clients are getting access to the content they need.

But no. I was dealing with a color problem. Specifically, my client was complaining that the background color on the web pages wasn't the right shade of blue. It didn't match the corporate color – which was not something anyone else even noticed or cared about, but he was adamant that it needed to be handled.

In the meantime, about a month into the project, he's still throwing up these nit-picky fit-it issues while he hasn't completed the content for his clients yet. We're waiting on him to get us the training content, and his 800+ members are wondering why they're paying \$500 per month for content they haven't gotten yet. And enrollment dropped by half at the end of the first month.

He was simply focused on the wrong details. The ones that didn't move the ball forward – but the ones that kept him up at night because they wouldn't let him go. So of COURSE we didn't hit our first quarter goals because we were focused on the wrong thing. In the end, we did manage to right the ship and stabilize enrollment. We just had to get it through his head that there were more important big-picture issues that needed to be handled before we worried about the color of the background.

Details are important, but without the bigger picture, your Great Work loses its meaning to the world. That means recognizing how each detail serves the greater whole so that you don't get obsessed about something that's a bit more trivial in the grand scheme of things.

**Fusions** – of which I am one, and I know there are a few of you listening today – we seem to stay in a perpetual state of busy-ness. Meaning we're always up to something. DO-ing is our standard modus operandi. Fusions move quickly and can get stuff DONE – LOTS of stuff. But that doesn't mean it always gets marketed. We have the best and worst of both the Chaotic and Linear types, so we can see the big picture AND the details. We are, after all, the Jack of all trades type, the quick study that knows a lot and can fake our way through a whole lot more.





Growth stalls for fusions when they won't stop wearing all the hats. In truth, it really is faster to just do it yourself – for a long while. But when the moment comes that you need help, you need it NOW and haven't got anyone to delegate to!

You haven't built the "strong ties" relationships. You've got a vast network of loose connections, but you don't have the depth that your business needs to really grow your exposure. You're also prone to perfectionism and analysis paralysis because of your eye to detail and results oriented nature. So if you DO get something done, chances are good you'd rather move on to the next project instead of investing the time to effectively market your offer to the world. The creating is fun, but the waiting for buyers can be excruciating.

I'm experiencing this in my own business. I did an offer inventory earlier this year and discovered I had over 100 products and services available for sale. I create like crazy, so I was only slightly surprised by that number. What really surprised me was how many of those offers had little to no sales – solely because I didn't take the time to market them properly once they were created. If something didn't sell right out of the gate, I put it aside and moved on to create the next thing.

This year, I've been MUCH more intentional and slow to create much of anything. It's felt a little tedious at times, to be honest. And I've felt the fear of missing out and the guilt of not being everywhere consistently. Like I said earlier, I had to make some tough choices about how I was going to invest my time this year if I wanted to be able to take 2.5 months off this summer. I had to say NO to a lot of opportunities and put money into other things I might have never done before.

Like my booking agent. Some of you know Dana, and I'm working on getting her in here to teach about building your speaking career. I had thought about hiring someone to do that for a long time, but the investment scared me, quite frankly. This year, when I got clear about how I want my business to look and feel, speaking and stage time moved to the top of my list of imperatives, so it was no



longer something to stall on. I called Dana and hired her to help me get on more stages. I couldn't wait on it any longer. As a Fusion I could keep doing the leg work to find the speaking opportunities. I mean, it's not like I couldn't do it myself. But I really couldn't. I didn't have the bandwidth. I have clients to serve and I wanted to spend as much time as possible this summer with my kids. So I stepped up, owned the truth of what really mattered to me and made the investment.

There are a lot of people that question what I'm doing, who think I'm dumb for doing things the way I've chosen to do them. That's okay. As a Fusion I have to remember to let go of my need to compare myself to anyone but myself. That's when my light really shines.



# HOW TO GET BACK ON TRACK

## Clarity + Confidence + Courage = Cash Flow

Now that you know what might be tripping you up and stalling your growth, it's time to make a plan to get back on track.

**So let's begin by getting clear** on what track you want to be on.

Don't take this step lightly. Remember it's easy to say "I want to make \$10,000 a month, no matter what it takes." But when you find out it's going to take more than you have to give are you still going to want it?

I've talked about the six-figure distinction in the past. Sometimes you **NEED** a six figure income to cover your living expenses and run your business with a sense of peace and ease. Sometimes you just need to adjust your expenses – of time, energy, and money – and you don't need anywhere near six figures.

You've got to get clear on what your real priorities are – not just for the next six months, but for the next year. So many creatives build out an annual plan in January and then keep trying to course correct through the end of the year, when in reality, you always need to be looking at the next 12 months.



So yes, let's look at the rest of 2017, but also at the first half of 2018. If you run a retail store, you know that the Christmas catalogs and trends are already hitting the merchandise markets. It's June and store owners are already making the buys for the holiday season, and the trend setters are using the data from this season to make plans for next year.

THAT is why having a full year view is so important. It's the bigger picture. When I was working exclusively with direct sellers, I ALWAYS encouraged them to book at least 6 months out so that they always had a full calendar. You don't quit when your calendar is full.

So take a deep breath and think about the bigger picture of your life and Great Work. Look at both of them. You're a creative, so both of them work together like interlocking pieces. Look beyond December. Look into June of next year and get clear on what would really count as a win for you. Not a win that someone else wants for you, but a win for YOU.

Write that down. Write down anything that comes to mind about what really matters in the next 12 months. If you've got a bigger vision – a 3, 5 or 10 year plan, that's great, and it's hard to act on, so what are the 1-year milestones inside that bigger vision?

For example, I have a client that wants to be earning \$15,000 per month on a consistent basis. Great. That would be a huge win, but before we can get there, we've got a couple of other milestones to hit. We've got to stabilize her current income, we've got to grow that to a six-figure annualized income, and then we've got to maintain that pretty consistently. Those are all milestones along the way. Which one is the win for her in the next 12 months? That's up to her, but if she settles for anything less – or tries to drive for anything more – it won't feel satisfying.

So what's really important to you in your life and work in the next 12 months? What's the big win in each of those areas for you?





Now if it's possible, cut that goal in half, and there's where you need to be by December. Here's a warning, though, because it's not always possible to do simple math like that. Especially with "growth" type goals like income or list size – or weight loss, which is a reversed growth goal. Often times there's a lot of leg work that has to happen behind the scenes before you'll see the growth you want. And if you're a Chaotic, I hate to break it to you, but it'll take you a little longer than Linears or Fusions because of your inherent nature. That doesn't mean you won't be successful, but it does mean that if you're looking around, seeing other people "making it" and you're not "there yet", you can easily become discouraged and frustrated.

So factor in some maintenance time. In my Dreamblazing program I talk about "pumpkin" and "radish" goals. Dream blazing is the tool I've used for years now to help me get crystal clarity on what I'm really playing for in my life and work. Some goals are pumpkin sized, and others are more like radishes. Pumpkins take a whole season to bear fruit, while radishes can come up pretty quickly. Most growth-type goals are pumpkin goals, and if you treat them like a radish, you're going to frustrate yourself and give up well before you see the results you could have had.

**Once you have clarity on what you really want for yourself, you've got to have the confidence to take consistent action.** Notice, I didn't say "MASSIVE" action – that's a big buzz phrase you hear a lot of coaches use that are all about "the hustle" – and that's not me. Yes, there's a time and place for massive action, but no one can take massive action all the time. You'll burn out. But consistent action is something that you can define for yourself.

I have an Incubator client who has about 5 hours a week to devote to her Great Work. We used to joke about "riding the snail." But those few hours over the past year have really added up and now she's got momentum. Past clients are reaching out – out of the blue – and when she quotes her new, much higher prices, they're saying "Sounds good. Let's do it."



She didn't do anything revolutionary, and it took a LOT of behind the scenes work on mindset stuff as well as the mechanics of creating offers that work. But she kept showing up consistently, doing the work consistently. And here she is, nearly a year later, and she's actually GOT a business model that is generating real income. If she stays consistent, that income is going to grow to the point where she can leave her day job and do what she loves on a more regular schedule. Is she there yet? Not quite, but it's happening, and she's got some momentum behind her now.

And here's the funny thing about consistency. It builds momentum, which feeds your confidence. It's a virtuous cycle that feeds growth. That confidence gives you the courage to do the hard things you might not have ever considered before – like doubling your rates, or turning down clients who aren't a good fit when you would have said yes in the past because you need the money. It gives you the courage to change your business model so that it works for you – even when other people think you're nuts.

Helena had a great revelation this month. She'd been running a free Facebook group that was draining her energy. She was ready to give up on it, when I suggested she turn it into a paid group. She wasn't sure anyone would stick around, and wasn't confident about pricing. We finally settled in at \$10 per month for charter members. Sure, she got a little push back from a few squeaky wheels in the group, but she also designed something that fueled her energy and got her excited to be in the group again. And her audience responded. The group shrank considerably. From about 400 to 45 paying members. But our goal was 6. We called it "shoe money". If she could get 6 members that would pay for a pair of decent shoes. She got more than 8 times that number – a pretty nice pair of shoes if you ask me. And now, that money's coming in each month.

Other people thought she was wasting her time. Her copywriter refused to even touch the project because she thought it was beneath her. But Helena held steady to giving the experiment a go. And WOW! What a result.



Now I hear you say \$450 isn't a ton of money, and if that's what you're focused on, you're missing the point. Helena can now parlay this paid group into something even more powerful – a platform for deep research that drives all of her marketing and sales decisions because she's got exclusive access to a community of people who have willingly paid her to show up and tell her what's on their minds

Very often, the only thing limiting the results we can get is the thing resting between our two ears inside our skull.

That said, you still need to right-size your goals. That's where taking what you REALLY want and being really clear about what it's going to take to get there come into play.

I can want to make a million dollars in the next year, but if I don't have clarity on how that's going to happen, it probably won't happen very easily.

Now, I'm all for law of attraction and having things come in surprising ways. I'm also a believer in the adage that God helps those who help themselves. So if I want to make a million dollars, I'm at least going to hazard a plan to get there.

So if you're aiming for an income goal, what are the ways you're going to generate/find/create that income? And how will it come in? Are you going to launch something new into the world? If so, there's a lead time where you're not making any money, then there's a big push where a good portion of the money comes in, followed by a fallow period where interest wanes.

You've got to plan for that. You can't say "hey! I'll have a six figure launch, so let's divide that by 12."

That's not actually how the money's going to come in. And if you don't do the marketing leg work (Chaotics and Fusions, I'm talking to you), then the income won't come in at all, no matter how much work you put in to creating something.





Build an income plan that's as true to life as possible. That will show you not only where the holes are in the plan, but also what it's really going to take to help you hit those goals.

And if you have NO IDEA how to hit the goal, you've got to get out of your comfort zone and ask for some help. Maybe that means doing some research, or seeking professional advice. You're building a business and the sooner you get in the habit of asking for help from the right people, the easier it will be to grow.

## **Right-sizing doesn't mean dreaming small**

Let me be clear on this: right sizing doesn't mean dreaming small. You can still have a goal of hitting the million dollar mark in 6 months, so long as you're clear about what it's really going to take. And if more than half of that million is a big gigantic question mark, it takes a WHOLE lot of faith in the unexpected and divine blessings to make it happen. The more you can plan, the easier it is to bring it to fruition.

That also doesn't mean it's going to happen painlessly. Remember when I said April was pretty frustrating? I was waiting on a five figure check that took six weeks to arrive. All my plans were up in the air until that money got here. EVERYTHING was in limbo. Some things got delayed. I had to pay late fees. It was a pain in the butt.

And then the money came and I found more ease in the process. But it was hell in the interim. Like Inigo Montoya said in The Princess Bride: "I hate waiting!"

So that's the process. Get really clear on the year-long vision, then right size it for the next 6 months. And do it again in another 3 months, and again in another 3 months. Always be looking 1 year out. It may mean that growth comes more slowly, but it will be sustainable. I don't teach 6 figures in 60 seconds. There are people out there that teach that kind of hustle, hustle, hustle, but that isn't me. I want profitability AND sustainability.

That is what Creative Freedom is all about.





With that, let's open up the Q&A lines. Is there anything else you'd like more clarity on? Any ah-ha's you've had? What other questions do you have that, if you could get the answers, would be immensely helpful to you in moving your business or life forward?

This is your chance. I love taking your questions!

Remember, Accountability Club is here to help you take action and get results on the things you're already working on in your business. Or things you *want* to work on. It's really up to you, and you get to define success on your own terms in Accountability Club.

If you have an idea for an upcoming session, email me or post them in the group. I try to answer the biggest questions from our community, and if I don't have the answers, I find someone who does to share their best insights and information. As I said, I'm working on getting Dana in here to talk about building your speaking career.

The whole point of the group is to be a rising tide for each other. You can be part of that too, by going to [lisarobbinyoung.com/aclub](http://lisarobbinyoung.com/aclub) to learn more.

**(Q&A Session is not scripted or transcribed)**

That's going to wrap it up here on my end. Thank you again for taking the time out of YOUR busy schedule to be part of this training. I hope you got a lot out of it, and as always, if any questions come up later, please reach out. I'm here to help. And if you want more details on the Accountability Club, you can find them at [lisarobbinyoung.com/aclub](http://lisarobbinyoung.com/aclub)

Until next time, this is Lisa Robbin Young signing off, in blessings and peace, have a great day!





## ABOUT LISA

**Lisa Robbin Young** is the founder of **Ark Entertainment Media**, a production company and business incubator for creative entrepreneurs. Known as "The Courage Catalyst," Lisa believes the best way for entrepreneurs to be successful is to be themselves fully and completely, and define success on their own terms. With more than 20 years as both a performing artist and entrepreneur, Lisa has helped hundreds of clients, including best-selling authors, expand their reach, build a Noble Empire and live an inspired life.

An award-winning author and composer, Lisa's currently working on a project to record [300 songs](#) in a variety of genres, including jazz, pop, swing, and blues. Her best-selling book, [The Secret Watch](#), is a success parable written specifically for entrepreneurs.



*I'm Lisa Young and I love sharing stories that inspire you  
to take action to own your dreams and achieve  
the greatness meant just for you.*

