

**This is an edited transcript of the June 24, 2015 Smart Solo Business podcast interview titled – [How to Turn Your Best Ideas Into Goals, Projects and Successful Outcomes: An Interview with Charlie Gilkey](#).**

**Announcer:** Are you a hard-working, self-employed professional striving to work smarter, find more clients, and build a more profitable business? There is help. Welcome to the Smart Solo Business podcast featuring candid conversations about successful self-employment.

**Stephen Lahey:** Welcome to the Smart Solo Business podcast. I'm Stephen Lahey, and I'll be your host.

Today's guest, Charlie Gilkey, is a well-respected speaker and advisor on small business growth and business strategy. He's also the author of an Amazon bestseller, [The Small Business Life Cycle: The No-Fluff Guide to Navigating the Five Stages of Small Business Growth](#).

Now, let's be honest. We've all had great business ideas that never came to fruition. In the hectic world of the self-employed professional, ideas don't get done, but projects do. Charlie has a passion for helping solos and small business owners to turn their best business ideas into projects they can actually finish. The topic of our conversation today is his latest book, the *Start Finishing Action Guide: 25 Exercises to Guide You from Idea to Done* ([subscribe by email on the ProductiveFlourishing.com home page to get your free copy](#)). In the course of this content-rich interview, we discuss how to turn your compelling idea into a viable project and make it a reality. When you think about it, isn't it time to turn your ideas into projects worth doing? Projects you can finish? If you said yes, then get ready to take some notes and enjoy this interview with Charlie Gilkey.

Welcome to the podcast, Charlie.

**Charlie Gilkey:** Thanks so much for having me, and I'm excited to talk about this.

**Stephen Lahey:** Some of the listeners may not know you yet, so can you give us a quick sketch of your unique professional background and then share what you do today, Charlie?

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Charlie Gilkey: I started Productive Flourishing about, oh, I don't even know what year it is, it's around 2007. At the time, I was an Army military logistics coordinator, so I made sure that the Air Force and the Army were talking to each other at the same time, and I was also working towards completing my PhD in philosophy.

I noticed that the skill set that I had in one realm wasn't really applied well in the other. And it went both ways. The sort of pragmatic "let's get stuff done" from the military side of things wasn't applied to creative knowledge work, and the really good conceptual tools, framework and perspective that I had from my philosophy training wasn't applied to work. So you had on one hand, in one of my careers, a lot of really fantastic things happen that could sometimes get divorced from the meaning and purpose. That's on the military side. And on the academic side we had really great ideas, but not a whole lot of actual production and movement and change and transformation happening from those ideas.

Then I started writing about it and talking about it and found that there were other people who had that problem too, and that was the genesis of [Productive Flourishing](#). Along the way, people said, hey, I've got these business ideas and you seem to be good at planning, can you help me out? And so I said sure, and it's grown from there.

Now I largely work with small businesses and teams that are scaling or trying to get past that point where they just get stuck and can't grow without changing some fundamental ways in which they handle their business and/or team dynamics. So, that's what I'm up to.

Stephen Lahey: It's interesting because I know you work with solo entrepreneurs. And these are solos who may be saying, hey, I've been very successful, but now I'm going to try to grow my business *without* adding a bunch of staff. Plus you work with small businesses who are hiring people. So, it's an interesting mix, but I think they all have one pressing need that you hinted at, and it has to do with execution – actually completing the things that they know are most

important. I downloaded your new *Start Finishing Action Guide* ([subscribe by email on the ProductiveFlourishing.com home page](#) to get your free copy). It's great and I immediately knew that I had to have you on the podcast to talk about it. So, tell us about that free guide and why you wrote it, Charlie.

Charlie Gilkey:

The *Start Finishing Action Guide* is a workbook that contains different exercises that help you move from idea to done, 25 exercises actually. And the reason I created it was because of exactly what you mentioned. People have a lot of great ideas and then they fizzle, right? They just don't go anywhere. I wanted to create something that allowed them to take any idea and turn it into a project that gets done.

I tend to want to convert ideas to projects very quickly. You know that about me, Steve. It's because you can't really do anything with ideas alone, but you can do a lot with projects. So the guide helps you convert that great idea into a goal, which you can convert into projects and actually work through how and when you're going to get that done.

And so what I'll say about it—and sometimes I get in trouble with some of my friends about this—it's not rocket science. It's not that hard. It's just taking the different skills and frameworks and sitting down and focusing through it.

I wanted to create the guide so that it was self-contained. So that you didn't have to do what you sometimes have to do when you get a workbook or something like that, Steve, where you get the workbook and you've got to go read three books to figure out how to do the workbook and you're still no better off. So I thought, okay, what can I do to create a self-contained action guide? One where someone can take any idea and end up walking out with a project plan that's actually doable and finishable? My hope is that it's actually inspiring them to take that first action.

Stephen Lahey:

It makes a lot of sense to me because if you look at your client base, whether it's small business owners or solos, there's one thing they have in common. When they start to become a bit successful they're pulled in a lot of different directions and they don't need to have even more plates spinning. I think focus is a key word for a lot of people because a lot of people feel scattered in that situation. I think your guide is a very practical tool to help us focus and stay

focused on the priorities that we *should be* focusing on. And isn't that really what productivity is all about – doing what we should be doing at each stage of any project, right?

Well, as someone once said, well begun is half done. So why don't we start with the first few project stages as described in your guide. How can we start our projects strong and get some momentum going, Charlie?

Charlie Gilkey:

I always want to begin with the end in mind. Where are we going, why does this matter, and who will benefit? Those seem like obvious questions to ask yourself, but they're often we're like, oh, here's a great idea, and then we immediately move directly into planning it. We forget to say, whoa, whoa, whoa, wait a second, what are we actually trying to do here? Why does this matter and who will it benefit? And the reasons we've got to get really clear about that is that way once we start the actual project planning process, then we'll know where we're actually trying to go. And when we have to make the tough choices about doing this project versus some other project, we need to know why this project matters.

And I've found that with so many of the people I call "Creative Giants" that are passionate people. They care about others and they need to know the particular people who their project is going to benefit. I'm going to create this guide so they can take those ideas and get their new website done or start their podcast, etc. And that's, I think, where a lot of the juice comes from for me, too.

So before you start thinking about tasks and timelines and things like that, I think those are the three most important things. And then everything else can start to sort itself out a lot better.

Stephen Lahey:

It makes perfect sense. It's the who, the what, the where, the why. But it's also the challenge of staying focused on those things and, to me, they really are our GPS during the course of a big project. Our compass. Whatever analogy you want to use, it creates our context; and without context, it's very hard for me to stay motivated and keep taking action. So it all has to be there. I think it's a holistic approach and it's focused on the fundamentals.

Now, you and I were talking about Tony Robbins before the call. I have sort of mixed feelings about Tony, although I do like some of

his work. One of the things he said that I really do agree with is when he said, “You know what my work is? It’s getting people excited about the fundamentals.” People think the fundamentals are boring, but they’re what it’s all about. They’re what drives results. So, hey, I just quoted Tony Robbins and I never quoted Tony Robbins on this podcast before. It’s a first.

Charlie Gilkey: There you go. When we get down to it, it’s all about self-mastery. And there’s a wonderful line from the Tao Te Ching that he who masters the world, I count strong. He who masters himself, I count powerful.

Stephen Lahey: I love it.

Charlie Gilkey: And there are different translations of that, but that’s really what it comes down to, and especially for so many small business owners, “Creative Giants”, entrepreneurs, really talented people. I mean, let’s be honest, Steve, a lot of us were able to skate through high school and college. We never really had to apply ourselves and overall we just weren’t that disciplined.

Some of us were fortunate to have mentors and teachers that were really able to up level that game, but many of us were kind of in a system that got the average to be more average, but we were already exceptional, and so we didn’t cultivate the skills of self-mastery to really play the game at the level that we could. And so as adults, in many ways, you know, and this is what I figured out over the last decade of doing this stuff, as adults we’re still recovering from that and figuring out how to play our best game, and that’s all self-mastery.

Stephen Lahey: And you said “as adults”—maybe it’s really about becoming an adult. Fully mature as an adult. And even though I’m 52 years old, I can say that I’m still working on that.

Now, back to your guide book—I think it’s Page 22, so it’s pretty far into the book—you talk about action items and creating a list that’s focused on what we need to accomplish. And that sounds basic, but you lay out a really interesting two-step process that helps people to avoid getting stuck. Can you walk us through those steps?

Charlie Gilkey: That two-step process actually shows up throughout the workbook. What happens is when we immediately go to a level of detail that's too granular, we lose the big picture and then we start worrying about fluffy little details that, at a certain point, don't matter; or we get stuck on one particular item trying to flesh that out when the real job was fleshing out all the items that we need to do first. So even at the beginning of the *Start Finishing Action Guide*, when it's about "What are you trying to accomplish?" I don't talk about setting goals at that point because I don't want people to already be starting to think about things that narrow way. I want people to say, hey, what's the basic idea here? Then we can get more granular.

That's what's happening on Page 22 when we start talking about action items. I want you to start by listing everything that needs to get done without worrying about time and who's doing what and just get it out of your head. Just get it out of your head. And then on the second pass, that's when you start processing it. Those are two completely different cognitive tasks, and I think that's where people get messed up is they get down three items, they get stuck on the third one, they might get down another two items, they get stuck on the first one, and they don't get to the other ones that they need to, and so you got to think about those. And I credit David Allen who has written a lot about this in his book, *Getting Things Done*.

So, again, what happens is that you have all these loose action items kicking around in your head and bouncing off things and you just can't focus, and the first step is getting them down on paper and then the second step is getting them processed.

Stephen Lahey: Now later in the guide, you also talk about creating an initial roadmap, quote, unquote. Basically it's a rough draft. How do we approach that?

Charlie Gilkey: So once you got those action items written down and you start sorting them—doing what's called sequencing those projects—that's actually going to give you a rough draft roadmap of what needs to happen. Now I do that in a two-step process because what people often do is they're like, okay, I'm going to start this process, I'm going to start this project, and then I'm going to finish that project, and so they just list everything out. And everything looks good until you ask them, well, what do you need to do to get ready

to start? And they're like, oh, there are these other three or four things I need to do before I start. Then when you ask them, what do you need to do to finish? They're like, oh, well, I need to do that, I need to do that. Wait a second. If I need to do that, I need to do that during the project and set it up.

And so again, that's why we have two different roadmaps. We have that initial get it written down, see the lay of the land; and then we have the second one where the person comes back and says, okay, let's get a little bit more detailed, let's think about the start-up and close down of this project because that likely is going to affect how you will execute on this project.

Stephen Lahey: Yes.

Charlie Gilkey: And again, Steve, when I do planning with anyone, whether it's strategic planning or whether it's just that I'm planning their day, I try to remind people that the point of the plan is not to lock you into some sort of straightjacket. It's really an awareness generating process.

I want people to approach planning as if they were writing it on a whiteboard or if they were writing it in pencil and it's all there to change. You change the plan over time. You coax that plan. You tweak that plan as you get involved in the activity.

So you think it's going to take you three weeks to do something—it takes you four weeks. All right. Good. You learned that it took you four weeks. If you're really learning to be a good planner and you're really learning about self-mastery, then you don't beat yourself up because it took you longer that time. You beat yourself up on the next project when you make the same error again because you weren't paying attention to it. That's where you would beat yourself up. That's where you just start to be kind of frustrated with yourself because you're not learning. You're not adapting. You're not really paying attention to the fact that there are these real constraints that meter your power.

And so, yes, a lot of the entire action guide is encouraging people to take multiple stabs at a project and not get such fixed thinking that they can't get the plan done.

Stephen Lahey: And just thinking in terms of the roadmap idea, a lot of entrepreneurs, I've found, are visual people – they think fast and they act fast and so on. But when they can't picture where they need to go next, it's hard for them to act. So, do you see mind mapping as a useful approach during that stage?

Charlie Gilkey: Absolutely. I love mind mapping. The challenge with mind mapping is—and this is for everyone who loves mind mapping, you'll know what I'm talking about—whenever I teach mind mapping or show people how to do it, I always divide the page so that one-third of it is just blank when you start creating the mind map. Then there's the second-third, the bigger part of the page where you actually draw out the mind map. Why? Because I want that left side to be where you take some of those ideas that you've added to the mind map and start to sequence and order them and actually make your to-do list there *after* you've made your mind map. So I would just encourage anyone that does that to make sure that they add an additional step. That is, take those ideas and go ahead and turn on that processing side of your brain to turn them into actual action items and add who you can delegate them to, so on and so forth.

Stephen Lahey: Now, as people are listening, their heads may be spinning with all the interesting stuff that you've talked about, and now I'm going to ask an odd question. So, what happens *after* we complete our project?

Charlie Gilkey: That's actually a great question. The first thing that I'm always going to say is celebrate. Celebrate after you do a project? Yes, seriously, every time you do something that matters, you have made a really important step towards your own actualization; and if those projects that matter have actually helped someone, you've done something that has made the world better, and that requires celebration. If you can't celebrate small projects, you're never going to be able to celebrate big projects, so you just got to make celebration as part of that. And especially if you're in a team setting—if you're doing projects with teams, always pause and say, you know what, that was a great job, or I'm glad we did that, or we scored a touchdown, whatever that looks like. We need that as people. We need that positive feedback because it fuels us into the next project.



What I don't cover in this particular project guide that much is doing an "after action review". Now, I told you about my military background, but this is just a debrief of what went well, what didn't go well, what items you want to sustain from this particular project, and what things you need to change going forward.

Debriefs are the best way for you to hone your planning skill set, and, if you work with others, it's the best way for you to reward people who did a great job, and it's the best tool for learning. And so again, not covered in the context of this because I wanted to keep the guide focused, but celebration, doing a debrief, documenting what happened so that when you start your next planning cycle you can look back and go over that. That's important.

I'm going to pause here for small businesses or anyone who's launched something—a book, a website, a course, whatever. The reason why it takes some people ten launches to really get it under their belt is because they do the launch and then they move right into the next thing, and then two to three months later they start from scratch all over again. That is the very worst way to run a business. In my view, it's the very worst way to run a creative life.

So, an important part of that process is celebrating, doing the debrief, building the tools and templates and scaffolds and everything that you need for the next project right when it's fresh and hot, and then move on.

By the way, another project guide that I'm working on, Steve, is really about how to wrap up a project. I think people are just not giving the project clean up enough time and that's really making them go a lot slower in the future. So that's really what I would suggest people to do—celebrate, debrief, prepare for the next project.

Stephen Lahey:

Yes, and it occurs to me that a lot of the people listening are like me, in that they don't have any employees. But they probably do use some outside service providers on a contract basis. I think what you've just said about debriefing and learning actually applies really well to that kind of freelance relationship too.

If you have a good relationship with that freelance service provider, then debriefing and learning together will make it an even

better relationship because you understand each other that much more and there can be more empathy. I mean, they'll have feedback for you on what they think went well and didn't go well, and you will too.

And of course if it's a small business with employees, then debriefing makes great sense. It makes sense in terms of gathering and documenting organizational knowledge so that it's not all up to you as the owner to know and guide everything.

One of the things I see is that when people do scale up their business and add employees, for at least some period of time the owners, who tend to be very high-energy people—a lot of entrepreneurs are—and because they can sort of burn the candle at both ends and work crazy hours—you know, think Elon Musk or someone like that, well, they don't necessarily put in place the organizational learning documents so that someone else can then take some things off their plate.

There was someone I know who is a solo, and he actually went the extra mile with his virtual assistant and created videos for her on how he likes to do things—basically videos of his desktop using Camtasia or something like that—how he likes to do certain tasks and why, so it saved him and her time, it actually brought her in on it in a pretty direct way without him having to be speaking with her directly. He does project debriefs as well.

So if someone is thinking, I don't have employees, so I don't need to do that. If it's to be, it's up to me. Well, so, you're going to develop your new website, end to end? You're going to do all the tech stuff in your business yourself—no, probably not. You're probably going to need outside specialists do certain things. So, I think debriefing applies just as much in that case, don't you?

Charlie Gilkey:

I 100% agree. For outside contractors and employees, we have a library of screen cast videos on how to do things. Like how to log into WordPress, how to do this and that. Another example, and this is very specific, we have a designer's kit that has our brand colors, the fonts we use, different rules about how our website works, etc. Why? Because I know if I bring in a new designer, they're going to need that at the very beginning. Otherwise they're going to panic and they're going to do something wrong. So why make them learn that lesson all over again? Especially, on my

dime, right? Because you're going to get charged for that. And so just say here is my brand kit, here are my fonts, here are all the things you need to know, here's where you find these things, etc. That makes a huge difference because you have set that whole relationship up to succeed.

And if you have independent contractors, you're still forming a team. And so setting them up for success, taking care of them, making it easier for them to do the job, they're just going to want to do that much better of a job on the project themselves, and you won't be one of those clients for them where, like, oh, I don't want to work with that client, everything is so hard. Guess what? Those clients get put to the bottom of the list. So don't be that person.

The last two things I want to say, if I can. One, I wrote about what you mentioned earlier. I call it founder's mojo, and I wrote about that in *Small Business Lifecycle*, which is my book on how small businesses grow. The thing about founder's mojo is we forget that non-founders don't have it. And we expect them to have that sort of mojo that says, hey, I can wake up at 4:00 and work until 10:00 and know where everything is and make these really confident choices and have a strategic vision and know where the money is coming from. All of that rich information that you have, well, other people don't have that. Even other owners that come into your business, they don't have the knowledge of the business because they're still trying to learn all that. So that's one thing to always remember.

And the second thing is that even if you're not trying to set up somebody else up to do things for you on a daily basis, recognize that that person who comes back to help with your website, say, nine months later may not remember what all those codes were, may not remember where everything is, and may do the same stupid thing that somebody else would do –and that person is you. Nine months from now with the way that businesses grow and all the things that you're trying to do, you won't remember that much, nor should you. But, if you can document it, then why wouldn't you do that? That way you can focus your brain power on the relationships, the sales, the marketing, the product development, the things that really matter and that add the highest value to your business? Focus on that. Use your brain there and all this other stuff should just get documented.

Okay, you didn't ask about that specifically, but still, it's a trap we get into. We just make ourselves work harder because we can't see out into the future and see that at some point we're going to be doing this again and we don't want to have to randomly relearn all these lessons again.

Stephen Lahey: I totally agree. It's still about focus and strategy and, to some degree, simple learning systems. And that brings us full circle because that's what your *Start Finishing Action Guide* does for us ([subscribe by email on the ProductiveFlourishing.com home page](#) to get your free copy). I mean, your guide allows people to do all that.

So as we wrap up, I am sure that listeners would like to connect with you online, Charlie, and get their own copy of the *Start Finishing Action Guide* for free at your website. How can they do that?

Charlie Gilkey: Great. If they go to [ProductiveFlourishing.com](#), that's where you can sign up. We have strategic website sign up, so you don't have to look for one. There's one at the top. You'll get a little scrollbar that's not intrusive but still does its job, and you'll get the *Start Finishing Action Guide* as a part of joining up by email. But you won't just get that. You'll get a lot of the other worksheets and tools and just things like that that I create. Just about every month, Steve, I'm creating something new that solves some of these problems. And so that's where you can go to get that. [ProductiveFlourishing.com](#).

And if you like your inspiration on the go, we've got [The Creative Giant podcast](#) as well, which is just a behind the scenes look of what it takes to really be a thriving, creative entrepreneur, leader, person out there making change happen in the world.

Stephen Lahey: Yes, and I'd strongly recommend it for people enjoy a good podcast, which they probably do since they're listening to this one, so subscribe, without a doubt. So thank you again so much for joining us, Charlie.

Charlie Gilkey: Hey, I love talking about this stuff, and thanks for giving me the chance to talk about self-mastery and the not-sexy side of finishing the stuff that matters.



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Stephen Lahey: Well, I appreciate what you do, and I know our listeners do too. And to our listeners, thank you for spending some time with us today. If you like what you heard, visit [SmartSoloBusiness.com](http://SmartSoloBusiness.com), and click the green button to subscribe by email. Along with fresh podcast content and blog content, you'll also receive my all new interactive workbook *Expand and Improve Your Client Base*, which I know you'll love. Thanks again for listening today and best wishes for your success.

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