



THE
APPROACH

Business Goal Setting and Tracking Tools

A structured approach to business goal planning and execution, emphasizing the importance of setting SMART goals, tracking progress at different intervals, and aligning daily actions with overarching business objectives.



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Nail That Goal – SMART Goal Setting



Write Your SMART Business Goal Here

(See next page for description of SMART and help with writing successful goals)

by Day - Month - Year**Motivation**

WHY I want this goal for my business (the specific 'outcome/s' you are looking for)	
List ALL the Benefits here (of achieving your goal)	
The BIG Benefit (of achieving goal)	
What is the PAIN? (of not achieving your goal)	
Achieving this Goal will also help me (other areas)	

Obstacles (also known as your secondary gain)

I need to be aware that the BENEFIT to me of NOT completing this goal is	<i>Note: It's ESSENTIAL that you complete this question</i>
Other obstacles to my success include	

Set Goal Levels (eg. your goal could vary on timing, quantity, quality)

MINIMUM	
TARGET	
EXTRAordinary	

How will you or your business need to BE different? (a worthwhile goal often requires us to look at / do things differently)

In order to achieve this goal I/we will START doing	
In order to achieve this goal I/we will STOP doing	
In order to achieve this goal I/we will need to BE someone/a business that is	

Moving Forwards (eg. equipment, people, personal qualities, processes, information/knowledge, skills, technology, support, finance etc.)

Resources available to achieve goal	
Resources I will need to achieve goal	

Taking ACTION (make sure these things are achievable so you can easily take action and get this moving)

3 steps I will complete in the next WEEK that move me/us closer to this goal	1. 2. 3.
3 steps I can complete in the next MONTH that move me/us closer to this goal	1. by 2. by 3. by

Great Goals are:

1) Stated in the **POSITIVE**. We tend to get what we focus on! Negatively stated goals make your brain picture what you DON'T want instead of the positive outcome you're looking for (try NOT thinking about an alligator biting your toe!). Plus, negatively stated goals are a painful reminder, rather than an inspiration.

EXAMPLES

Eg. Use, "I have a fabulous new sales assistant" instead of, "I have to fire Peter"

Eg. Use, "I weigh 180lbs" instead of, "I want to lose 50lbs"

2) Stated in the **PRESENT TENSE**. This means every time you think of this goal, you're picturing success!

EXAMPLES

Eg. On 30th September I have a fabulous new sales assistant / weigh 180lbs.

NOW make sure your Goals are:

3) "SMART"

- **Specific** - the more specific you are the easier your goal is to achieve
- **Measurable** - so you know when you have achieved it
- **Action-oriented** - ie. you can DO something about it! Is it within your control? Ie. Winning the lottery is not a "SMART" goal
- **Realistic** - Goals need to be both challenging to inspire you AND realistic so you set yourself up for success
- **Time-Bound** - has a deadline

Lastly, describe a day in your life, or the life of your business, once this goal is completed:

(Imagine first waking up or walking into work, describe how you feel. Now think about what you see, hear and - importantly - how you FEEL. Fully describe your day now this goal is completed. Who are you? Who is around you? Where are you? What's important to you now? What is your business like? How is your business operating differently?)

*Remember that goals are there to **INSPIRE** you, not to beat yourself up with.*

Weekly Daily To Do List Action Planner



Weekly Action Planner

INSTRUCTIONS: Refer to your monthly/quarterly goals and use these to figure out your Weekly Actions. Then use this page daily to drive your Daily Action Planner. Don't overschedule yourself - first review your diary for pre-existing commitments. **SMART Actions are:** Specific, Measurable, (easily) Actionable, Realistic, Time-bound.

1) Key SMART Goal Actions

Your Top 3-5 SMART Actions that move you towards your goals - in priority order. These actions should be completable this week (if not break them down into smaller chunks).

☐ 1.

☐ 2.

☐ 3.

☐ 4.

☐ 5.

2) Quick Wins

Small actions with big impact that could take a few minutes to 1 hour

☐
☐
☐

3) Filler Tasks

Fill gaps with regular or necessary tasks that take 30 minutes or less

☐
☐
☐

Future Ideas

Capture your important ideas here.

4) Delegate / Get Help

What do you need or want help with? I will delegate/get help with:

☐
☐
☐
☐
☐
☐

Future SMART Goal Actions

Make a note here of any actions you need to remember/your top priorities to work on next week

Other

5) Personal Tasks

You: Appointments, pay bills, self-care actions
Others: Birthdays, Anniversaries, Commitments

☐
☐
☐
☐

Daily Action Planner

INSTRUCTIONS: Refer to your Weekly Action Planner, and then use this page daily to plan out your day ahead. Refer back to this page throughout the day - and whenever you've completed an action. **Tip:** Don't overdo it! Review your diary first: What can you achieve given your pre-existing meetings/commitments? Working daily on one big project action and 1-3 smaller actions is ideal. **SMART Action reminder:** Specific, Measurable, (easily) Actionable, Realistic, Time-bound.

My Top 3 Actions This Week (in priority order):

1. 2. 3.

	Daily Work Priorities - Work FIRST on What Matters MOST		Other Tasks
Monday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Tuesday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Wednesday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Thursday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Friday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>

Notes

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Annual Business Goals Planner



Business Name: _____ Today's Date: _____

Part 1 - Set the Stage

My Theme for this Year is _____

1. Where do you want your Business to be in 10 years?

If you've done business visioning exercises, now is a great time to review them. So, it's 10 years from now. Think big picture: Where, ideally, do you want to be? Be realistic but also inspired - think POSSIBILITY not probability. Take a moment to really visualize it, what will your business will look like, feel like, what might you be hearing, seeing?

2. What do you WANT for your business, but don't have yet?

Anything from financial success to a type or number of clients, joint ventures, equipment, employees.

1. _____
2. _____
3. _____

3. What do you HAVE in your business, but don't want?

Eg. things that waste time, money, get in the way of business success - anything that adds stress or cost without reward.

1. _____
2. _____
3. _____

4. What's most important to you in the next year? My Top 3 Business Priorities are:

Part 2 - Set your Goals!

Goals to be completed no later than _____ / _____ / _____ (one year from now)

5a. If you did nothing else, WHAT 3 things would make this coming year a business success? What would you be disappointed you DIDN'T achieve? Be SPECIFIC!	5b. WHY bother? What outcomes are you looking for? WHY this goal? What are the BENEFITS to you or your business?	5c. WHEN will you achieve it by? Note: Pick a date to aim for that inspires, but does not drain you.	5d. HOW will you know you achieved this goal? How can you measure it?
1. .... .....		...../...../2.....	
2. .... .....		...../...../2.....	
3. .... .....		...../...../2.....	

6. Identify 7 Secondary Goals - for a total of 10 Business Goals

Notes for setting Secondary Goals:

- These goals are a secondary focus of your business. They may be small things that have been 'niggling' at you for some time, they may be stepping stones to longer-term goals, or they may be large goals in themselves.
- The key here is that they are important enough to you to be worth writing down and working towards.
- These goals must be distinct from the primary 3 goals.
- You must be able to state the goal in one sentence.
- The goals need to be specific, and measurable in some way - with the measure as part of the goal.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

Goal 6:

Goal 7:

Part 3 - Preparing for Success

7a. Success Accelerators

What can I start doing, stop doing, do more or less of that will help me achieve these business goals?

7b. Smash those Obstacles

What could get in the way? If you were going to sabotage yourself how would you do it?

7c. What is the best advice I could give myself to achieve these goals?

Part 4 - Taking Action

8. So, what ONE thing will you do to get started on EACH goal in the next month?

Write out just ONE action that you will complete towards EACH goal in the NEXT MONTH. This is the FIRST STEP. Break the action down into a smaller step or action until you can commit 100%. If you want to do more than one action, great, but there must be a minimum of ONE.

GOAL 1 Action _____ by _____

GOAL 2 Action _____ by _____

GOAL 3 Action _____ by _____

And finally, what ONE action could I take tomorrow? _____

Part 5 - Support and Commitment

9. WHO will help & support me? What KEY support do I need?

Eg. Your personal trainer, coach, a friend, gym-partner, family, a work colleague. Get specific as to how they can support you.

1. Who _____ HOW Specifically? _____

2. Who _____ HOW Specifically? _____

3. Who _____ HOW Specifically? _____

10. Who will you have to BE to achieve these goals? _____

11. How likely OUT OF 10 do you feel it is that you will achieve these goals? ____ / 10

WHEN your score is 8 or more – you have a plan.

12. IF your score is LESS THAN 8 ask, "What, that I perhaps haven't mentioned yet, might stop me from achieving this goal?" Then ask, "What am I prepared to do about it?" until you reach 8 or more.

☐ I am committed to achieving these goals Signed _____

Quarterly Goals at a Glance



INSTRUCTIONS: Referring to your **Annual Business Goals Year-at-a-Glance Summary Sheet**, consider and identify your Quarterly Goals using the worksheet below.

Quarterly Focus _____ Top 7 Goals	How Important	Goal Completion Date/Measure			Complete	KEY ACTIONS:
		Minimum	Target	Extra ordinary		
1.	..... / 10				Y / N	
2.	..... / 10				Y / N	
3.	..... / 10				Y / N	
4.	..... / 10				Y / N	
5.	..... / 10				Y / N	
6.	..... / 10				Y / N	
7.	..... / 10				Y / N	

Business Goals Year at a Glance



INSTRUCTIONS: Using your **Annual Business Goal Planner Worksheet** write out your Annual Goals below to create a Year-at-a-Glance Summary Sheet.

Key Focus for the Year: _____ Top 10 Goals (be specific)	How Important	Goal Completion Date/Measure How you will know it is complete?			Complete	KEY Goal Benefit
		Minimum	Target	Extra ordinary		
1.	..... / 10				Y/N	
2.	..... / 10				Y/N	
3.	..... / 10				Y/N	
4.	..... / 10				Y/N	
5.	..... / 10				Y/N	
6.	..... / 10				Y/N	
7.	..... / 10				Y/N	
8.	..... / 10				Y/N	
9.	..... / 10				Y/N	
10.	..... / 10				Y/N	

Month _____ Year _____ Monthly Focus _____

	Action	Complete by Date	Delegate to / Support Needed	Actual Completion
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				

Monthly Action Tracker



	Action	Complete by Date	Delegate to / Support Needed	Actual Completion
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
21.				
22.				
23.				
24.				
25.				

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