



Annual Business Goals

Visioning & Planning Worksheet



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:

1. _____ 2. _____ 3. _____

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..... | |



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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:



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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? _____



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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 _____