2026
Small Business Goal Setting

<u>Directions for using this document</u>

1. This document is not locked allowing you to change variables. It was created using a sharable template link. This allows you to change the colors to match your brand and make it more personalized. I **STRONGLY SUGGEST** you use the "Change All [this color]" feature ot the Style Brand Kit tools within Canva for bulk color edits without effecting the core words. Here is a **<u>link</u>** on how to do that.
2. This document was created in Canva and can be edited in the app. You must have a Canva account (you can use the free version). If you need help on how to set up your account please follow this **<u>link.</u>**

2. The image on the cover page can be updated. Upload the picture you want to use into canva and drop into the circle located in the middle of the cover page. Here is a **<u>link</u>** to a video tutorial on how to update the image.
3. You can change the color of the banner to your brands color by following this **<u>link</u>**
4. You can add your logo on each page by uploading your logo and dragging it into the top banner. For a video tutorial follow this **<u>link</u>**
5. Text can not be changed but you can respond to the questions by typing in each field

Business Goal Setting Explained

Page 1

<u>Business Theme:</u> generally refers to the central idea or concept that guides the identity, branding, and messaging of a company or business initiative.

<u>Business Vision:</u> is a forward-looking statement that outlines what a company aspires to achieve in the long-term. It serves as a guiding star for the organization, providing direction and inspiration.

<u>Business Mission:</u> a concise statement that defines the core purpose and focus of an organization. It articulates what the business does, whom it serves, and how it delivers value.

Page 5

<u>S.W.O.T.:</u> is a strategic planning tool used to identify and evaluate the Strengths, Weaknesses, Opportunities, and Threats related to a business or project. It helps organizations understand their internal and external environments, aiding in effective decision-making.

Business Goal Setting Explained continued

Page 7-11

Benchmark: is a standard or point of reference used to measure the performance or progress of an organization against specific goals. It serves as a comparative tool that helps organizations evaluate their achievements relative to industry standards, competitors, or past performance.

Target Date: is a specific deadline by which an organization aims to achieve a particular goal or benchmark. It provides a timeframe for reaching objectives, ensuring that progress can be tracked and evaluated effectively.

Time Allocated: refers to the specific amount of time designated (daily, weekly or monthly)for achieving a particular goal or benchmark within a set timeframe.

Page 12

KPI (Key Performance Indicators): is a measurable value that demonstrates how effectively an organization or individual is achieving key business objectives. KPIs are critical for goal setting as they provide concrete metrics to assess progress and success.

Foundations of Business Strategy

Business Theme:

Business Vision:

Business Mission:

2025 Reflections

What goals or milestones did you accomplish for 2025?

What goals do you want to continue working on in 2026?

What were the most impactful actions that helped move your business forward?

2025 Reflections

What challenges or setbacks did you face in 2025?

2025 Reflections

SWOT Analysis

STRENGTHS

WEAKNESSES

OPPORTUBNITIES

THREATS

2026 & Beyond

ANNUAL GOALS

Most people overestimate what they can do in 1 year and underestimate what they can do in 10

YEAR 1 GOALS	

YEAR 3 GOALS	

YEAR 5 GOALS	

YEAR 10 GOALS	

2026 S.M.A.R.T. Goals

(Specific, **M**easurable, **A**chievable, **R**elevant, **T**ime Bound)

Financial Goals (annual target & monthly breakdown)
Focus on increasing revenue, cutting cost, improving cash flow and boosting profit margin.

GOAL:

WHY:

DEADLINE:

Benchmark	Target Date	Time Allocated	Notes

2026 S.M.A.R.T. Goals

(Specific, **M**easurable, **A**chievable, **R**elevant, **T**ime Bound)

Growth Goals:

Aim to scale your business by entering new markets, increasing market share, launching new products, or expanding your workforce.

GOAL:

WHY:

DEADLINE:

Benchmark	Target Date	Time Allocated	Notes

(Specific, **M**easurable, **A**chievable, **R**elevant, **T**ime Bound)

Operational/Systems Goals (automation)
Improve internal effectiveness like streamlining workflows, reducing errors, enhancing product quality or implementing new technology.

GOAL:

WHY:

DEADLINE:

Benchmark	Target Date	Time Allocated	Notes

2026 S.M.A.R.T. Goals

(Specific, **M**easurable, **A**chievable, **R**elevant, **T**ime Bound)

Customer-Focused Goals

Enhance customer experience, measured by satisfactionscores, response time or loyalty programs.

GOAL:

WHY:

DEADLINE:

Benchmark	Target Date	Time Allocated	Notes

2026 S.M.A.R.T. Goals

(Specific, **M**easurable, **A**chievable, **R**elevant, **T**ime Bound)

Marketing & Brand Goals

Increase brand awareness, improve online presence, generate leads and build community engagement

GOAL:

WHY:

DEADLINE:

Benchmark	Target Date	Time Allocated	Notes

(Key **P**erformance **I**ndicators)

Area	Target