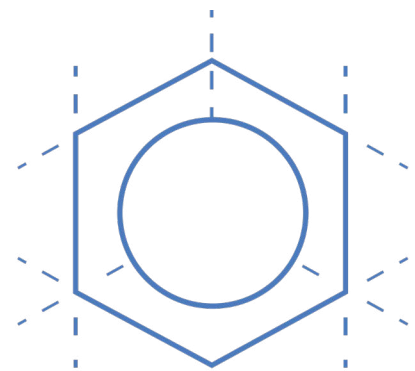




CLARAFi



Goal Setting for Success

Workbook

Workbook Outline

Module #1 Clarity

In this module we will focus on gaining clarity in your business and the goals that you want to achieve. To do that, we'll write down our past and present figures, as well as what figures we'd like to attain in the future.

Module #2 Objectives

In this module we'll be looking at objectives. Are we behind? On Track? Ahead of schedule? You'll have sections to list and track the goal, as well as make note of the people needed to make it a reality.

Module #3 Actions & Obstacles

What are the top three urgent obstacles keeping you from your goals? What are three actions that you can take to overcome them?

Module #4 Looking Ahead

What are some needs you can predict will come up? We can't read minds or predict the future, but we can anticipate needs based on past events. In this module, we'll be taking a look at potential needs that we need to be aware of, and how we can be proactive in our approach to those needs.

Module #5 Get SMART

It's time to set up some SMART Goals.



Module #1

Clarity

Clarity



Let's start at the beginning and create a picture worthy of your business. Be honest in your figures, create thoughtful projections and lean into whether the goal is more than a passing wish. In this exercise we hope you discover the truth in your dreams and the ability to create momentum and motivation toward capturing them!

Worksheet #1

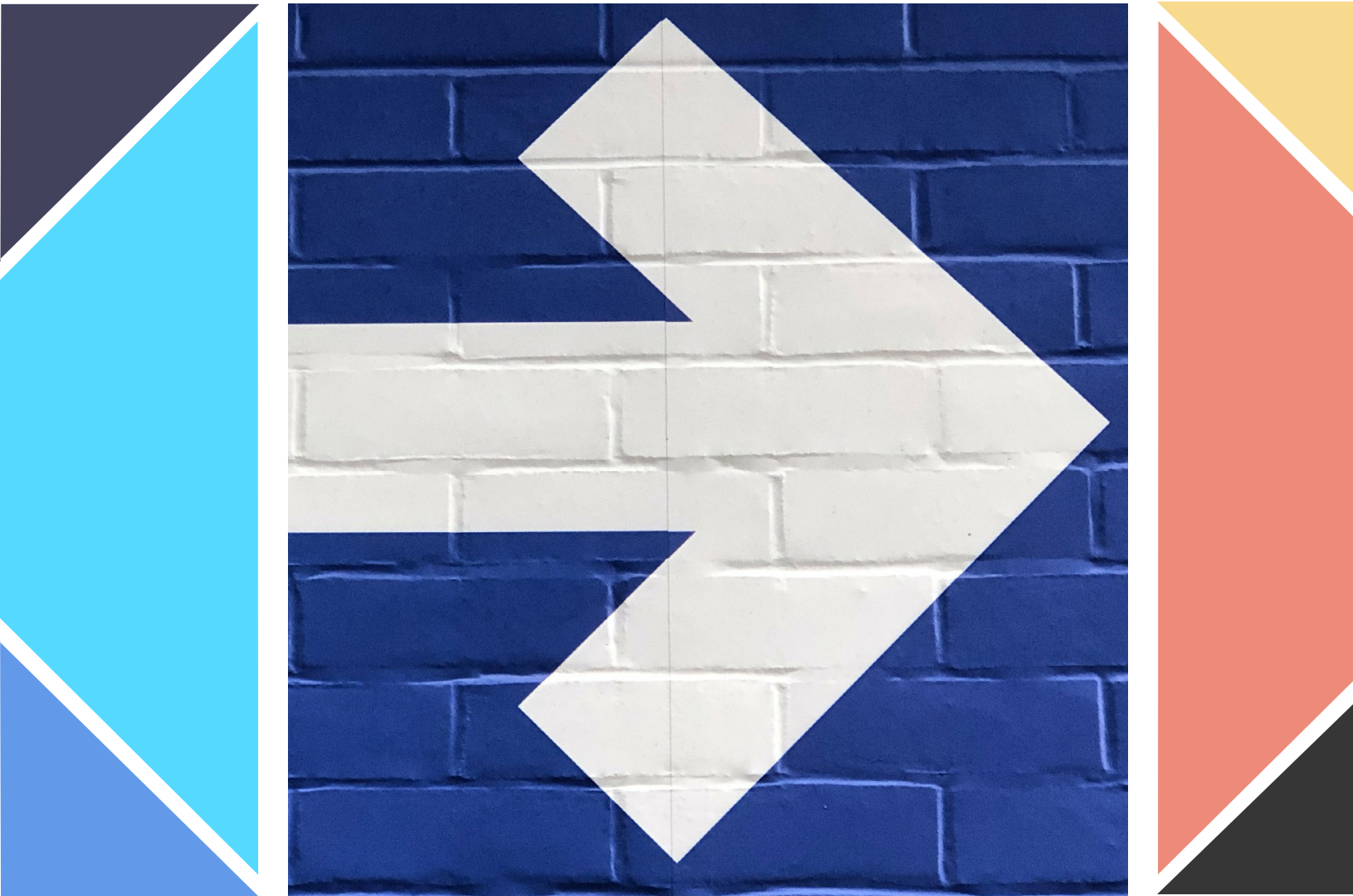
If you could achieve anything in your business, what would it be?

i.e. "Scale my business to create more opportunity for my community / more time with family / retire etc"

Q For the **previous year**: What were your annual revenues, payroll, and other costs?

Q For the **next year**: What are your projected annual revenues, payroll, and other costs?

Q What goals do you have around the areas of revenues, payroll for employees, and other costs? What are your wishes, wants or needs?



Module #2

Objectives

Worksheet #2

Annual goals or objectives

Status

Ahead

Behind

On Track

Ahead

Behind

On Track

Ahead

Behind

On Track

Ahead

Behind

On Track

Action and Team Notes



Module #3

Actions & Obstacles

Worksheet #3

What are the Top 3 urgent issues or obstacles facing your business today?

Be honest with your answers. We can't move forward without knowing what's holding us back.

What are three actions you can take to address the issues listed above?

Stick with three for now. Even the largest issues can only be tackled one piece at a time. Before you know it, they'll be issues of the past.



Module #4

Looking Ahead

Worksheet #4

Potential Needs to Monitor

Priority

Low

Medium

High

Low

Medium

High

Low

Medium

High

Low

Medium

High

Details

Who | When | Where | What



Module #5

Get SMART

Worksheet #5

Add your to the following worksheet, then use the SMART process to determine the characteristics of your objective[s]. SMART stands for **Specific, Measurable, Achievable, Relevant, and Time-Bound**. An objective should look like this:

“To reinvest directly into training up my current team through pay raises and lifestyle balance systems.”

My #1 Goal:

SPECIFIC: Who? What?
When? Where? Why? Which?

MEASURABLE: Metrics &
Milestones. How much?

ACHIEVABLE: Do you have
the tools to accomplish this?

RELEVANT: Does it fit with
organizational objectives?

TIME-BOUND: Intermediate
and Final deadline.

Objective #1

SPECIFIC: Who? What?
When? Where? Why? Which?

MEASURABLE: Metrics &
Milestones. How much?

ACHIEVABLE: Do you have
the tools to accomplish this?

RELEVANT: Does it fit with
organizational objectives?

TIME-BOUND: Intermediate
and Final deadline.

Objective #2

Worksheet #5

SPECIFIC: Who? What?
When? Where? Why? Which?

MEASURABLE: Metrics &
Milestones. How much?

ACHIEVABLE: Do you have
the tools to accomplish this?

RELEVANT: Does it fit with
organizational objectives?

TIME-BOUND: Intermediate
and Final deadline.

Objective #3

