

# Annual Business Goal Setting

Date: \_\_\_\_\_

## Part 1 – Looking Back

### 1. What were your top achievements last year?

Big, small, what were your best accomplishments?

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|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

### 2. What did you learn about yourself and running a business?

Anything at all.....a skill, lesson learned etc.....

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### 3. What new or existing business relationships did you develop?

Who did you grow your relationship with?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### 4. What challenges did you overcome?

What was hard? What are you proud of?

- |          |          |          |
|----------|----------|----------|
| 1. _____ | 2. _____ | 3. _____ |
|----------|----------|----------|

### 5. Where did you have the most fun and enjoyment in your business?

What did you enjoy most in your business last year? This could be anything at all.

- |          |          |          |
|----------|----------|----------|
| 1. _____ | 2. _____ | 3. _____ |
|----------|----------|----------|

## Part 2 - Set the Stage

### 6. Where do you want your business to be in 10 years?

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 visualise it, what will your business look like, feel like, what might you be hearing, seeing?

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### 7. What do you want for your business but don't yet have?

E.g. Financial success, a certain type/number of clients, joint ventures, equipment, employees

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### 8. What do you have in your business, but don't want?

E.g. Time/ money-wasters, things that get in your way and anything that adds stress /cost without reward

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### 9. What areas do you need to focus on in the year ahead for your business?

E.g. Creating a client enrolment system, growing income, hiring help, finding office space, social media, your website.

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|----------|----------|----------|
| 1. _____ | 2. _____ | 3. _____ |
| 4. _____ | 5. _____ | 6. _____ |

## Part 3 - Set Your Annual Business Goals

### 10. Your top 3 annual business goals

<b>a) If you did nothing else, what 3 things would make this year a success?</b> What would you be disappointed not to achieve? Be specific	<b>b) Why bother?</b> What outcomes do you want? Why this goal? What are the benefits to your business? E.g. get more clients, reduce cost or stress, build brand awareness	<b>c) By when will you achieve it?</b> Pick a date that inspires you but does not overwhelm!	<b>d) How will you know you have achieved this goal?</b> How can you measure/ prove its complete?
1.		___/___/20__	
2.		___/___/20__	
3.		___/___/20__	

### 11. Identify 7 secondary goals

- These goals are distinct from the primary 3 goals, and are a secondary focus of your business.
- They may be small things to get finished, stepping stones to longer-term goals or larger goals in themselves.
- State the goal in one sentence and they should be specific and measurable in some way e.g. A time deadline, financial amount, person employed, no. of people reached or other task achieved. Make the measure part of the goal.

Secondary Goal 1. \_\_\_\_\_

Secondary Goal 2. \_\_\_\_\_

Secondary Goal 3. \_\_\_\_\_

Secondary Goal 4. \_\_\_\_\_

Secondary Goal 5. \_\_\_\_\_

Secondary Goal 6. \_\_\_\_\_

Secondary Goal 7. \_\_\_\_\_

## Part 4 - Preparing for Success

### 12a. Success accelerators

What can you start doing, stop doing, do more of, or do less of that will help you achieve your business goals?

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### 12b. Smash obstacles

What could get in the way? If you were to sabotage your achievement of these goals, how would you do it?

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### 12c. Advising yourself

What is the best advice you could give to yourself to achieve these goals?

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## Part 5 - Support and Commitment

**13. If you had a theme for this year, what would it be:** \_\_\_\_\_

E.g. "I can do it", "Simplify!", "Work smarter not harder", "Work first on what matters most", "Delegate!", "Follow up!"

**14. Think about the year ahead. Who will help you? What key support do you need?**

E.g. Your partner, coach, a friend, family, colleague, technical support person. Be specific as to how they can support you.

Who? \_\_\_\_\_ HOW Specifically? \_\_\_\_\_

Who? \_\_\_\_\_ HOW Specifically? \_\_\_\_\_

Who? \_\_\_\_\_ HOW Specifically? \_\_\_\_\_

**15. I commit to achieving my goals. Signed** \_\_\_\_\_ **Date** \_\_\_\_\_

## Part 6– Get Inspired and Get Started

### 16. What one thing will you do to get started on your goals in the next month?

Write out one action that you will complete towards each of your top 3 goals in the next month.

Break the action down into a smaller steps or until you can commit 100%.

**GOAL 1 Action** \_\_\_\_\_ by \_\_\_\_\_

**GOAL 2 Action** \_\_\_\_\_ by \_\_\_\_\_

**GOAL 3 Action** \_\_\_\_\_ by \_\_\_\_\_

*Congratulations on taking the first steps towards achieving your goals.*

*We exist to inspire and support you to accomplish your dreams and reach your full potential. We hope this worksheet has brought you a step closer to achieving that.*

*Feel free to check out our web site [www.theorchardpartnership.com](http://www.theorchardpartnership.com)*

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