

SMART Goals Worksheet

PART 1: 5 WHY'S

This exercise is an emotional experience to discover your inner fire! *Why are you building your business this year?* _____

Why? _____

Why? _____

Why? _____

Why? _____

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PART 2: BHAG

Set a Big, Hairy, and Audacious, Goal (BHAG)! What's the vision you have for 2023? It should scare you as it may seem just out of reach and also motivate you with the question 'What if?' Let's put a BHAG around your vision. What is your BHAG for 2023?

NOTES / THINK SPACE

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PART 3: SMART Goal

Make your goal SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound). We must convert your BHAG into a goal that you can track and be held accountable.

- a) What is your goal's deadline (usually 12/31, year end)? _____
- b) What is your household or family budget? _____
- c) What was your December Year-End recurring revenue and profit? _____
- d) Average Revenue Per Recurring Client: _____
- e) Sales Conversion (#leads → 1 sale) _____
- f) Employee Conversion (#applicants → 1 "retained" employee) _____
- g) Other relevant data? _____

What is your SMART Goal? _____

NOTES / THINK SPACE

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PART 4: QUARTERLY GOALS

We need to make your goal manageable by breaking it up into smaller bite-sized portions. Start with your year-end SMART goal and divide into 4 parts.

Quarter 1 SMART Goal: _____

Quarter 2 SMART Goal: _____

Quarter 3 SMART Goal: _____

Quarter 4 SMART Goal: _____

NOTES / THINK SPACE

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PART 5: MONTHLY GOALS

Divide your quarterly goals into monthly goals with associated action steps (tasks, networking, coaching, etc) which will enable you to hit each goal.

QUARTER 1

January SMART Goal: _____

January Action Steps: _____

February SMART Goal: _____

February Action Steps: _____

March SMART Goal: _____

March Action Steps: _____

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QUARTER 2

April SMART Goal: _____

April Action Steps: _____

May SMART Goal: _____

May Action Steps: _____

June SMART Goal: _____

June Action Steps: _____

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QUARTER 3

July SMART Goal: _____

July Action Steps: _____

August SMART Goal: _____

August Action Steps: _____

September SMART Goal: _____

September Action Steps: _____

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QUARTER 4

October SMART Goal: _____

October Action Steps: _____

November SMART Goal: _____

November Action Steps: _____

December SMART Goal: _____

December Action Steps: _____

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PART 6: LANDMINES

Identify your landmines! This will NOT be a cakewalk. List your potential landmines that could derail you from accomplishing your BHAG (fears, distractions, health, saying 'yes' to everyone, other people, lack of money or time, etc)? What has held you back in the past? These culprits are likely to strike again if you let them.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Thank you for participating in the SMART Goals Workshop! It's time to take action on what you're promised yourself. That's called accountability!