



Business & Financial Goals

“Be SMART at Setting Goals!”

Specific, Measurable, Attainable, Realistic, Timebound

Areas of Focus for Business & Financial Goals Rate Yourself Now: 1 (needs improvement) to 10 (already rocking it)	Is a SMART Plan in Place for Progress: ✓
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Where I am now	Where I want to be	Plan In Place
_____	Income	_____
_____	Time Management	_____
_____	Time Off	_____
_____	Margin: Cost vs Profit	_____
_____	New Client Intake	_____
_____	Rate of Referrals	_____
_____	Continued Learning	_____
_____	Networking / Relationships	_____
_____	_____	_____
_____	_____	_____

Create SMART plans for each goal above. Then think about what drives you to achieve those goals, and what inspires you to persevere when challenges and obstacles arise? In regards to your goals, answer the below questions to help you define Your WHY:

W Who Matters? _____

H How will life change for them? How will success change life for YOU? _____

Y Your WHY summed up in a Mission Statement: _____

Make your Mission Statement visible, and with every action and decision ask, “Does this take me toward my goals and support my vision?”