



PRO's Goal-Setting Worksheet

Objective: Take a big-picture approach to goal-setting by using long-term goals to drive shorter-term goals. Set SMART Goals (Specific, Measurable, Achievable, Realistic and Timely goals). Create defined, concrete Action Plans that will move you toward your goals.

Vision Goals: Where do you want to be in *three years*?

Define 3-5 goals in concrete, measurable terms.

Examples: I want to have XX% of market share. I want to generate \$X,000,000 in revenues. I want to sell X # of widgets. I want to hire X high-performing salespeople.

- 1.
- 2.
- 3.

365 Goals: What goals do you need to achieve *this year* to help achieve your Vision Goals?

Define your 365 Goals in concrete, measurable terms.

Examples: I want to have X% of market share. I want to generate \$X,000,000 in revenues....i.e., scaled-down versions of your Vision Goals that you can achieve in one year.

- 1.
- 2.
- 3.

365 Action Plans: Plot activities to achieve *this year* that will get you to your 365 Goals.

Identify your activity goals, the resources you need to achieve them, first steps, and project due dates.

Example:

Activity: Revamp and search optimize our website to achieve higher organic searches.

Resources Needed: \$X,X00-\$X,X00 for web designers and X-XX hours of my time.

First Steps: Conduct competitive review, critique our website, create differentiation, interview X designers.

Due Date: X months from today.

Activity #1:

Resources Needed:

First Steps:

Due Date:

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365 Action Plans: Plot activities to achieve *this year* that will get you to your 365 Goals (cont.)

Activity #2:

Resources Needed:

First Steps:

Due Date:

Activity #3:

Resources Needed:

First Steps:

Due Date:

Activity #4:

Resources Needed:

First Steps:

Due Date:

Activity #5:

Resources Needed:

First Steps:

Due Date:

Now Goals: To achieve your 365 Goals, what activities will you achieve in *the next 90 days*?

Activity #1:

Resources Needed:

First Steps:

Due Date:

Activity #2:

Resources Needed:

First Steps:

Due Date: