



# Business Goals & Planning Template

Whenever you plan,  
you plan to succeed.

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## Goal Setting

USE the **SMART, PURE, and CLEAR** system to guide strategy and create noteworthy Performance Goals

<b>S.M.A.R.T</b>	<b>P.U.R.E</b>	<b>C.L.E.A.R</b>
Specific	Positively Stated	Challenging
Measurable	Understood	Legal
Achievable	Relevant	Environmentally Sound
Results-Oriented	Ethical	Appropriate or Agreed upon
Time Framed		Recorded

[Click here](#) for the SMART, PURE, CLEAR worksheet

Notes:

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## The Method and Why Behind Planning System

A planning system is designed to get you and your clients to think strategically. A planning system is meant to provide clarity on what needs to be done, what goals are to be achieved, and what amount of time should be spent on achieving the outlined goals.

Proper planning is essential, not only to encourage us to achieve the goal we set, but also to break it up into bite-size pieces or small goals that make achievement much more attainable. In this document, we will begin with Long-Term Goals and then break them down into mid-term, short-term, and then daily action planning.

As we break the goals down, planning is also about creating accountability, the discipline to achieve the personal development plan and goals of the business/organization. Your client and their team should have the following:

- a. Annual Plan
- b. Quarterly Plan – everything in the plan should meet the annual goals
- c. Monthly Plan – everything in the plan should meet the quarterly goals
- d. Weekly Plan – everything in the plan should meet the monthly goals
- e. Daily Plan\*- everything in the plan should meet the weekly plan goals

**\*The MOST IMPORTANT action plan is the 'DAILY PLAN'.**

When you do not achieve what is on your daily plan, you will not achieve your weekly goals, you will not achieve your monthly goals, and so on. Each day mustn't focus only on short-term goals; we focus on our mid to long-term goals too. When we are consistently focusing on mid to long-term goals, we are working towards the vision of the company, achieving team and organizational results, and focusing on the bottom line for the business.

Besides putting the plan together, the **ULTIMATE GOAL** is to create personal discipline and habits to increase productivity.

***'Failure to Plan is Planning to Fail'***

## Busy vs Productive

In addition to having SMART, PURE, CLEAR goals, effective planning is knowing the difference between being BUSY and being PRODUCTIVE.

Satisfying though it may be, **busy** is where you knock items off your to-do list, switching between tasks all day long, and moving all the time, until at the end of the day you are exhausted.

TRUE PRODUCTIVITY is having the ability to single-task (as opposed to multi-task).

True **productivity** is where:

- You achieve your goals
- You accomplish important and long-lasting things
- You are getting key projects done
- You schedule non-important/urgent tasks (For example, answering a bunch of emails, making a lot of phone calls, attending meetings with no purpose, paperwork)
- You focus on closing key deals
- You focus on talking to business owners
- You focus on quality instead of quantity
  - Schedule the following “appointments” in your calendar and stick to the time
    - Social Media
    - Emails
    - Voicemails and Return Phone Calls
  - Clear away distractions
    - Have a clean and clutter-free desk
    - Silence all phones during scheduled key project/tasks
    - Turn off all computer notifications

To achieve the above, you must change your mindset and plan effectively. The way to change your mindset is to get rid of the “To-Do List” and create a “**To Achieve List.**” Once you’ve learned to focus on important projects/tasks and schedule your non-urgent tasks, you will find you are more efficient and more productive throughout the day.

## Long-Term Goals

The desire to make your business successful often comes from the understanding that with your business success comes the ability to achieve your personal goals. The best way to achieve your goals is to define your long-term goals (5 – 10 years) and then break them down into 3-year, 1-year, 90-day, monthly, weekly, and daily goals.

### B.H.A.G

BHAG stands for **Big, Hairy, Audacious Goal**, an idea theorized in the book, [Built to Last: Successful Habits of Visionary Companies](#) by James Collins and Jerry Porras. A BHAG is a long-term goal that changes the very nature of a business's existence.

A great BHAG is as the name suggests: [\(from Workfront\)](#)

- **(B)ig**—It's so big that it's not something that your organization can accomplish in a year, or three years, or even five. It takes a minimum of ten years to accomplish something this ambitious.
- **(H)airy**—The idea seems wild and crazy because it's so forward-looking and so out-of-the-box. It's something you've never done before.
- **(A)udacious**—It should have a 'gasp factor' that makes you sit up and listen when you first think about or hear it. The next emotion should be that it's exactly the right idea for your company to pour its heart and soul into.
- **(G)oal**—The BHAG must have a clearly articulated goal (or goals) connected to the company's strategy, which can be measured so that success can be defined and celebrated.

A true BHAG requires a long-term commitment and cannot be achieved in three or five years. Plan on a minimum of ten years to accomplish a BHAG, possibly even two or three decades. Make sure your BHAG is doable, however—not a long shot or pipedream. It should, at a minimum, have a 50% chance of being achieved.

But because it is so big, hairy, and audacious, it can energize everyone in an organization. "You look at it and say, 'Oh my goodness, if we're going to bring the world into the jet age, or transform education, or put a computer on every desk, then we have to get to work today with a level of intensity that is unrelenting,'" encourages Collins.

The BEST resource and for more information on What is a B.H.A.G, How to create a B.H.A.G, and Why is B.H.A.G important, visit <https://www.workfront.com/strategic-planning/goals/bhag>.

[Examples of B.H.A.G from the Growth Institute](#)

## B.H.A.G Exercise

Take time to think about what it is you are striving to achieve (personal or professional).

What are the key drivers behind what you're doing now and for your future advancement?

Get emotionally connected in the setting of your goals. What's your Why?

List your goals...

- Write those down that have real meaning and importance to you.
- Write them in a way that when you share them with others they are clear, powerful, and inspiring.

What do you want to achieve, for:

Yourself

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Your family

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Your community

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Your clients

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Other stakeholders/investors/partners

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Others not yet identified

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Review what you have written and prioritize them:

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Define Your B.H.A.G in one sentence -

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Now that you have created your B.H.A.G, let's go deeper and break it down.

## 5-10 Year Goals & Action Plan

Write down your 5-10-year goals and generally dedicated learnings, actions, steps to achieve the goal in each category – (as a coach, add, change as needed)

Personal Goals	Learnings / Actions / Steps to Achieve the Goal
SAMPLE - Start My Own Business	Take an Entrepreneur Course, Seek Funding, Speak to Business Advisor/Broker

Professional Goals	Learnings / Actions / Steps to Achieve the Goal

Financial / Wealth Goals	Learnings / Actions / Steps to Achieve the Goal

Health & Fitness Goals	Learnings / Actions / Steps to Achieve the Goal

Financial Goals	Learnings / Actions / Steps to Achieve the Goal

Relationship Goals	Learnings / Actions / Steps to Achieve the Goal

Travel Goals	Learnings / Actions / Steps to Achieve the Goal

Property / Investment Goals	Learnings / Actions / Steps to Achieve the Goal

Charitable Goals	Learnings / Actions / Steps to Achieve the Goal

Other Goals	Learnings / Actions / Steps to Achieve the Goal

## 3-Year Goals & Action Plan

Break down your 5–10-year goals into 3-year goals, go deeper into your learning/actions/steps to achieve the goals by adding a timeframe with specifics.

Personal Goals	Learnings / Actions / Steps to Achieve the Goal
SAMPLE - Start My Own Business by Year 3	Complete Entrepreneurs Course – Year 1 Research Business Advisors/ Brokers – Year 2 Finalize Business Name, Apply for all necessary documents to register a company, Build website – Year 3

Professional Goals	Learnings / Actions / Steps to Achieve the Goal

Financial / Wealth Goals	Learnings / Actions / Steps to Achieve the Goal

Health & Fitness Goals	Learnings / Actions / Steps to Achieve the Goal

Financial Goals	Learnings / Actions / Steps to Achieve the Goal

Relationship Goals	Learnings / Actions / Steps to Achieve the Goal

Travel Goals	Learnings / Actions / Steps to Achieve the Goal

Property / Investment Goals	Learnings / Actions / Steps to Achieve the Goal

Charitable Goals	Learnings / Actions / Steps to Achieve the Goal

Other Goals	Learnings / Actions / Steps to Achieve the Goal



## 1-Year Goals and Action Plan

Break down your 3-year goals into 1-year goals, go deeper into your learning/actions/steps to achieve the goals by adding a timeframe with *specifics into quarters*.

Personal Goals	Learnings / Actions / Steps to Achieve the Goal
SAMPLE - Start My Own Business by Year 3 - Complete Entrepreneurs Course – Year 1	Q1 – Research Entrepreneurs Course & Acquire Funding needed for the course Q2 – Register and pre-work for course Q3 & Q4 – Take Course and Complete

Professional Goals	Learnings / Actions / Steps to Achieve the Goal

Financial / Wealth Goals	Learnings / Actions / Steps to Achieve the Goal

Health & Fitness Goals	Learnings / Actions / Steps to Achieve the Goal

Financial Goals	Learnings / Actions / Steps to Achieve the Goal

Relationship Goals	Learnings / Actions / Steps to Achieve the Goal

Travel Goals	Learnings / Actions / Steps to Achieve the Goal

Property / Investment Goals	Learnings / Actions / Steps to Achieve the Goal

Charitable Goals	Learnings / Actions / Steps to Achieve the Goal

Other Goals	Learnings / Actions / Steps to Achieve the Goal

Prioritize all your goals above and transfer to a one-page document – [click here for One Page Template](#)

BUSINESS GOALS TEMPLATE		B.H.A.G				Insert BHAG
NAME	DATE	TITLE				
ANNUAL GOALS & OBJECTIVES	Q1	Q2	Q3	Q4	Learnings / Actions / Steps to Achieve the Goal	
(Insert Goals from your planning worksheet)						

## Quarterly Goals

Use your One-Page Goals template and transfer the 1-year goals into 90-day goals, go deeper into your learning/actions/steps to achieve the goals by adding a timeframe with **specifics into months**. This plan also has a status section to stay on track with your goals.

- Red – Not on track
- Yellow – Delayed, potential issues
- Green – On track

Personal Goals	Learnings / Actions / Steps to Achieve the Goal
Q1 – Research Entrepreneurs Course & Acquire Funding needed for the course	Google Entrepreneurs Course and Make Decision on which course – Month 1 Research Funding options – Month 2 Apply and Acquire Funding – Month 3

# Business Goals & Planning Template

## Q1 BUSINESS GOALS TEMPLATE

B.H.A.G Insert BHAG

QUARTERLY GOALS & OBJECTIVES	MONTH	MONTH	MONTH	Learnings / Actions / Steps to Achieve the Goal	STATUS		
	1	2	3		Not on Track	Delayed	On Track
Transfer your goals and actions from your planning worksheet	X	X	X		X	X	X
<input type="text"/>							

## Monthly Goals

Use your 90-day goals and go deeper into your learning/actions/steps to achieve the goals by adding a timeframe with *specifics, and identify the week you will achieve the goal. (Get more specific, time, week 1, 2, 3, 4, who to talk, what are you going to research)*

Personal Goals	Learnings / Actions / Steps to Achieve the Goal
Google Entrepreneurs Course and Make Decisions - Month 1	Week 1 – Research – Business Options - <ul style="list-style-type: none"> <li>Do I want to buy a business, franchise, start my own?</li> <li>What Type of Business do I want? Retail, Service</li> <li>What certifications do I need? Tony Robbins, John Maxwell, AddingZEROS, ActionCOACH, Center for Coaching Excellence</li> </ul>
Research Funding options – Month 2	Week 2 – Research, Business Loans, Personal Equity

B.H.A.G Insert BHAG

DATE	TITLE												
MONTH	MONTH	MONTH	Learnings / Actions / Steps to Achieve the Goal	Week 1	Week 2	Week 3	Week 4	STATUS					
1	2	3		Week 1	Week 2	Week 3	Week 4	Not on Track	Delayed	On Track			
X	X	X		X	X	X	X	X	X	X	X		

## Weekly Goals

Use your Monthly goals to go deeper into your learning/actions/steps to achieve the goals by adding a timeframe with **specifics and identify the day you will achieve the goal**. Your weekly goals are now a paper list, and you will need to transfer your weekly goals to a “Weekly Achieve Action Planner” to be seen. Ideally, you would want to handwrite the list - the more we write and see it consistently, psychologically we create a behavior habit.

Download a copy of the Weekly “To Achieve” Action Planner, [click here](#).

### Weekly “To Achieve” Action Planner

Week \_\_\_\_\_

Monday Goals	TOP PRIORITIES
1.	
2.	
3.	
4.	
5.	

Tuesday Goals	TOP TASKS CHECKLIST
1.	
2.	
3.	
4.	
5.	

Wednesday Goals	
1.	
2.	
3.	

## Daily Goals

Use your daily goals to go deeper into your learning/actions/steps to achieve the goals by adding a timeframe with **specifics and identify the time of day you will achieve the goal**. Your daily action plan is now a paper list, and you will need to transfer what you have on your weekly action plan to a “Daily Achieve Action Planner.” Just like the weekly goals, **handwrite the list** - the more we write and see it consistently, psychologically we create a behavior habit.

Circle the Day of Week

Enter Your Top 3 Priorities of the Day

Energy is important – Coach on **ENERGY** and maintaining energy throughout the day.

By having your clients rate their day, we temperature check productivity.

## When to Plan and How Much Time to Plan

It is important to take the appropriate time to plan. Here is a suggested timeline for planning:

- BHAG, Long-Term Planning
  - Time Spend - 1-2 Days (Ideal, away from the office, travel/retreat)
- 1-Year Plan
  - Time Spend - 2 Days (Ideal, away from the office, travel/retreat)
  - When - October (gives time to finalize and be ready to begin plan Q1)
- 90-Day Plan
  - Time Spend - 1 Day
  - When
    - Q1- November
    - Q2 - February
    - Q3 - May
    - Q4 - August
- Monthly
  - Time Spend – 4 hrs.
  - When – 20<sup>th</sup> each month
- Weekly
  - Time Spend – 1 Hour
  - When – Friday (to be ready for Monday)
- Daily
  - Time Spend – 10 min
  - When – End of Day

## Planning is Dreaming: Make A Dream Board

- **Dream BIG!** Create your dream/vision/empowerment board.
- The Law of Attraction defines a dream board as a visual tool that can help you **define, understand, and focus** on a significant life goal.
- One person's vision board might **be very different** from another's. The only thing that all dream board examples have in common is that they are boards displaying pictures that represent the desired future.
  - Example: If you are looking for financial wealth, you cut out images, choose quotes, affirmations, or drawings that represent wealth.
- There are **many ways** to create a dream board. The simplest way is to acquire magazines (health, money, life, travel, etc.), cut images, quotes, and sayings that depict your desired future, and paste those images on a poster board.
- **Reminder** – A dream board is a working process that evolves - you can keep adding to your dream board.