**GOAL SETTING AND PLANNING WORKSHEET**

**General Instructions:**

Everyone works differently and I’ve tried to come up with a sheet that serves everyone well. I encourage you to modify this worksheet in the long run as you see fit. The goal here is to get you thinking about what you want to accomplish, what it will take to accomplish it, what tasks are involved, and how you should best prioritize and schedule those tasks.

There is no perfect order to complete this in, however all pieces work together, so I encourage you to go through it more than once and adjust and elaborate on your answers. Once you recognize certain tasks you may add to your 30 day goals. Once you create a new annual goal you may adjust the tasks necessary to get there etc. etc.

When it comes to tasks it’s very easy to create such elaborate plans that you can get stuck in set up forever. Do not get overly fancy with your marketing processes until you have the time and resources to do so. In essence it is 1000 times better to do Lives everyday, get people to comment, and follow up manually….than it is to spend all your time setting up an elaborate funnel with 10 pre-written emails, and never actually do the lives because you’re waiting to be fully set up. You will NEVER be fully set up, start simple.

Although it’s not part of this worksheet, once this sheet is done you should be able to properly schedule your work days and overall work week. You MUST work a schedule of some sort. And that schedule MUST stick to the 65% RDT, 30% PT plan. If you find yourself feeling as if those #’s are off then your priorities are off.

**IMPORTANT QUESTIONS TO ASK YOURSELF:**   
I’ll fill out a few examples based on my business so that you understand what you’re asking yourself. Do not just copy my answers. Give serious thought to what will best serve YOUR business.

**How Do You Intend To Provide Value To Your Marketplace?**

***Example:*** *FB Lives, Social Media Posts, Live & Automated Webinars*

**How To You Intend To Get Traffic (Eyeballs) To That Message?**

**Example:** *FB Ads To Best Lives, FB Ads Direct To Webinars, From Current Lists, From Affiliates*

**How Are You Going To Capture The Leads?**

***Example:*** *Webinar Registrations, Capture Pages To Giveaways, Messenger Bot w/Giveaways*

**How Are You Going To Communicate With Those Leads?**

***Example:*** *Email Auto responder Follow Up, Email Broadcasts, Messenger Broadcasts, FB Messenger, Phone Calls*

**What Will You Sell To Those Leads?**

***Example****: Social Testimonial Profits $297, Messenger Upsell Course $497, NM Company $500, Mastermind $5000, EntreInteractive $1-$29.95/mo*

**Where/How Will You Close The Sale?**

***Example****: Through Sales Webinars, Email Follow Up, Application Based Phone Calls*

**TASK IDENTIFICATION**

**RESULTS DRIVEN TASKS**These tasks should make up 65% of your work day. You should know how much, how often and when you’ll be doing each RDT. RDT’s in detail can become part of your 30 Day Goals.

**Content (What Type How Often) -**

***Example:***

*Automated Webinar Everyday*

*FB Lives - Twice Per Week*

*Live Webinars Every Other Week*

*Monday Mastery Call*

*Create New Giveaway Every Month*

**Direct Communication (What Type How Often)**

***Example:***

*Email Before Monday Call*

*Email Before & After Each Live*

*Messenger Broadcasts Before Each Live*

*Call All Applicants*

*Reply to Messages Daily*

*Email and Messenger Broadcast All Other Promotions*

**Promotion (What Type How Often)**

***Example:***

*Launch EI Once Per Month*

*Promote Social Testimonial Profits Ongoing With AutoWebinar*

*Launch Mastermind Every 3 Months*

*Promote NM Company On Back End of Funnel & Through FB Ad*

**Traffic (What Type How Often)**

***Example:***

*Run FB Ads Continuously To Automated Webinar*

*Spend Min $50 Promoting The Best of 2 Lives Each Week*

*Share Lives Day Of In The Following Facebook Groups*

**Other:**

***Example:***

*Going To A Networking Event & making 10 New Contacts*

**PREPARATION TASKS:**   
These tasks should make up 30% of your work day and should be chosen and prioritized entirely to support the most important Results Driven Tasks. In other words if nothing on your results driven tasks has to do with Instagram, you do not need to spend preparation tasks/time on an Instagram Training webinar.

**Learning:**

***Example:***

*Go Through New Facebook Ads Course*

*Go Through Evergreen Webinar Tutorials*

*Listen To Digital Marketers Podcast*

*Listen To New Audible Books*

**Set Up:**

***Example:***

*Write new email sequence for those who don’t buy Social Testimonial Profits*

*Create Application Form For Network Marketing Opportunity*

*Set Up Calendar To Manage Application Appointments*

*Cut New Sales Video For EntreInteractive*

*Set Up Capture Page For New Giveaway*

**Planning/Researching:**

***Example:***

*Plan out FB Live Topics For Next 2 Months*

*Schedule Monthly EntreInteractive Cart Open & Close*

*Find, Write & Schedule New Facebook Posts 30 Days Out*

**Other:**

***Example:***

*Post Application For Graphic Designer*

*Reconcile the books at the end of the month*

**DISTRACTION TASKS:**   
These are the tasks that you must avoid in order to become a more productive business owner.

**Online:**

**Example:**

Checking Facebook Notifications, Checking Email More Than Twice A Day

**Offline:**

Answering phone during work hours

**GOAL SETTING SECTION**

**Long Term Goals:** Remember long term goals are bigger picture and may not necessarily have a time line

***Examples:*** *Buy a new home in X city, quit my job*

**Annual Goals:** If you are going to set an annual goal than you must also determine what it’s going to take to reach that goal. It’s not enough to just say what you want to achieve. Annual goals should be specific and measurable.

***Examples:*** *reach 5k residual income, run a marathon, lose 40 lb.’s, Vacation to X*

**30 Day Goals:** You can definitely make some of your 30 day goals result/achievement oriented, but try and make a majority of them execution based goals. Things you have TOTAL control over. Set them as building blocks to your annual goals.

***Examples:*** *Do my Miracle Morning Every Day For 30 Days, Run 4 Miles 3 Days A Week For A Month, Do 2 Lives Per Week For The Month, Start 5 New Conversations Everyday For 30 Days*