**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:**

Give serious thought to what will best serve YOUR business.

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

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

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

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

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

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

**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) -**

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

**Promotion (What Type How Often)**

**Traffic (What Type How Often)**

**Other:**

**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:**

**Set Up:**

**Planning/Researching:**

**Other:**

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

**Online:**

**Offline:**

**GOAL SETTING SECTION**

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

**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.

**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.