

Annual Business Goal Planning Worksheet

12-MONTH ACTIVATE GAME PLAN

“Most people overestimate what they can do in one year and underestimate what they can do in ten years.” – Bill Gates

Personal or Business Name:		Period:		Date:		Version:	
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Description Of Current Business Situation:		Vision 12-months From Now:	
CURRENT METRICS:		SPECIFIC FUTURE GOALS:	
Current Annual Income From Your Business:		Desired Annual Income From Your Business:	
Current # Of Students, Customers & Clients:		Desired # Of Students, Customers & Clients:	
Current Status Of Sales & Marketing Efforts:		Desired Status Of Sales & Marketing Efforts:	
Current Internal State In Relation To Biz:		Desired Internal State In Relation To Biz:	
Other:		Other:	

ADDITIONAL GOALS (great place for persona, mindset or “root building” goals)		

VISION		
3 Year	5 Year	10 Year

SPECIFIC ACTIONS PLANNED TO FILL THE GAP								
Marketing & Sales Actions		Due Date:	Biz Dev Actions		Due Date:	Other Actions		Due Date:
1			5			9		
2			6			10		
3			7			11		
4			8			12		

QUARTERLY MILESTONES (Ideally, plan 3 months in advance)			
Q1 (January-March)		Q2 (April-June)	
1		1	
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
Q3 (July-September)		Q4 (October-December)	
1		1	
2		2	
3		3	
4		4	

5		5	
6		6	
7		7	

KEY STRATEGIC INITIATIVES PER QUARTER (Ideally, schedule your main activities at least 3 months in advance)		
Q1 (JANUARY-MARCH)		
JANUARY	FEBRUARY	MARCH
Q2 (APRIL-JUNE)		
APRIL	MAY	JUNE
Q3 (JULY-SEPTEMBER)		
JULY	AUGUST	SEPTEMBER
Q4 (OCTOBER-DECEMBER)		
OCTOBER	NOVEMBER	DECEMBER