SmartBug.

# Goal Planning Worksheet

On the following pages, the Goal Planner will offer areas to consider and an example plan to walk through. The last page is a blank plan for you to fill in.

# How to use the Goal Planning Worksheet:

| | Purpose | Questions to Consider | Example Statements |
|---|---|---|---|
| **Goals**<br>*What are you trying to achieve?* | A well-written goal statement can have a positive effect on your marketing campaign as it tells us what outcomes are most important to you. | • Are there any monthly/annual revenue goals that need to be hit by a certain date in the future<br>• How much do you need to grow different segments of your business?<br>• Are there lead generation targets you need to hit? What are they?<br>• What non-monetary goals such as fundraising, acquiring skills or launching a blog do you need to achieve? | • Generate an additional $10,000 in monthly revenue by December 2014.<br>• Grow our higher education segment by 35% by adding 15 additional customers @ $10,000 each before the end of 2014.<br>• Grow traffic from 5,000 to 15,000 in 18 months.<br>• Launch a blog by the end of Q1 |
| **Plans**<br>*What are your plans to achieve these goals?* | By understanding how you plan to achieve this goal, we understand what assets we have and what strategies and tactics should be applied to help you be successful. | • What are your specific plans to achieve these goals?<br>• What activities, partnerships or skills are required to achieve them? | • To hit the revenue targets, we will need to generate an additional 50 leads in the market segment per month and will do so via more focus on inbound and a small PPC campaign.<br>• Work with a marketing agency to create and launch a blog strategy that includes training our team |
| **Challenges**<br>*What is likely to challenge your success?* | Every plan has risks and challenges. By understanding these challenges in advance, we can help proactively overcome your challenges to increase the probability of achieving your goal. | • What roadblocks do you expect to challenge your success?<br>• Are you missing any skills or strategies that could help you?<br>• What other concerns make you less than confident you will achieve them? | More competitors have entered the market, creating more noise and competition for our marketing offers. Our challenge centers around differentiating ourselves and our offers with the new landscape.<br>We also have limited funding to be more aggressive. |
| **Timeline/ Milestones**<br>*What are the key milestones that show success?* | Most goals happen over the course of months or quarters. By identifying key markets/milestones along the way, we'll know if we're on track toward your goal. More importantly, if we're not, we'll know early enough to remediate. | • What deadlines need to be hit in order to be successful?<br>• What milestones/dates need to be hit to know you are on track?<br>• What plans do you have in place if you fall behind or believe you cannot hit the goal? | We need to see results before the end of June. With people on vacation, that would leave only three months after the summer vacation. Adding 5 additional customers by June would be ideal. |
| **Consequences**<br>*What may occur if you don't hit your goals?* | It's important for us to understand the implications you face if you don't hit your goal. It's the final piece that puts us all on the same page. | • What consequences do you face if the goal is not met? Will programs be cut? Budgets reduced? Negative impacts on your team? | If we don't hit our lead goal, we'll likely miss our sales targets. This could negatively affect our marketing budget next year. |

# Example Goal Planner:

| | EXAMPLE - Goal #1 | EXAMPLE - Goal #2 |
|---|---|---|
| **Goals**<br>*What are you trying to achieve?* | Generate an additional $10,000 in monthly revenue by December 2014. | Grow our enterprise business 33% in the next 8 months by acquiring 10 more customers who generate $4,500 each. |
| **Plans**<br>*What are your plans to achieve these goals?* | In order to achieve this goal, we need to general an additional 50 qualified leads per month. This assumes we will get 4 new customers at $2,500 each per month. We'll need to increase our website traffic an additional 8,000 visitors per month or 50%. | Our plan is to utilize best practices to take advantage of the traffic we already receive and convert more leads. |
| **Challenges**<br>*What is likely to challenge your success?* | Increasing traffic this much seems like a stretch and we are unable to spend much if any on PPC, because our CEO doesn't believe in it. | We have many landing pages but we don't convert leads effectively on our website. The sales team doesn't believe we know our customers very well and is reluctant to continue calling what they believe are *poor quality leads*. |
| **Timeline/ Milestones**<br>*What are the key milestones that show success?* | To be successful, we would like to show consistent growth along the following schedule:<br>• 20 leads/month by June 30<br>• 40 leads/month by Sep 30<br>• 50 leads/month throughout Q4 | Plan in place – March 1<br>45 new leads – Jun 30<br>90 news leads – Sep 30 |
| **Consequences**<br>*What may occur if you don't hit your goals?* | If we don't hit this sales goal, we are likely to miss our overall sales number. | We are concerned that if we do not meet these objectives, management will begin to doubt the competitiveness of our enterprise business. |

# YOUR GOAL PLANNER

**Completed: <Date Here>**

| | Goal #1 | Goal #2 | Goal #3 |
|---|---|---|---|
| **Goals**<br>*What are you trying to achieve?* | | | |
| **Plans**<br>*What are your plans to achieve these goals?* | | | |
| **Challenges**<br>*What is likely to challenge your success?* | | | |
| **Timeline/ Milestones**<br>*What are the key milestones that show success?* | | | |
| **Consequences**<br>*What may occur if you don't hit your goals?* | | | |