Business Credit Goal-Setting Template

1. Define Your Funding Needs

- What do you need funding for?
  - Examples: Marketing, inventory, real estate, equipment, hiring.
- Amount of funding needed: ____________

2. Set a Timeline

- When do you need funding by?
  - Example: 3 months, 6 months, or 1 year.
- Target Date: ____________

3. Identify Your Obstacles

- What challenges might slow you down?
  - Examples: Low personal credit, no revenue, lack of knowledge.
- List top 3 challenges:
  0. ____
  1. ____
  2. ____

4. Establish Key Milestones

- What are the major steps to take?
  - Examples:
    - Register business and get EIN.
    - Open a business bank account.
    - Set up Net 30 accounts.
- Milestone 1: ____________
- Milestone 2: ____________
- Milestone 3: ____________

5. Commit to Weekly Actions

- What can you accomplish each week?
  - Examples: Apply for D-U-N-S number, create a business website, get listed on directories.
- Weekly Action Plan:
  - Week 1: ___________
  - Week 2: ___________
  - Week 3: ___________
  - Week 4: __________
  - Week 5: __________
  - Week 6: __________

6. Visualize the End Result

- How will having business credit help your business?
  - Examples: Expansion, reduced stress, financial freedom.
- End Goal: ___________
