

# GOAL SETTING GUIDE

FOR SMALL BUSINESS OWNERS



## Objective

Setting clear goals gives your business direction and a way to measure success.

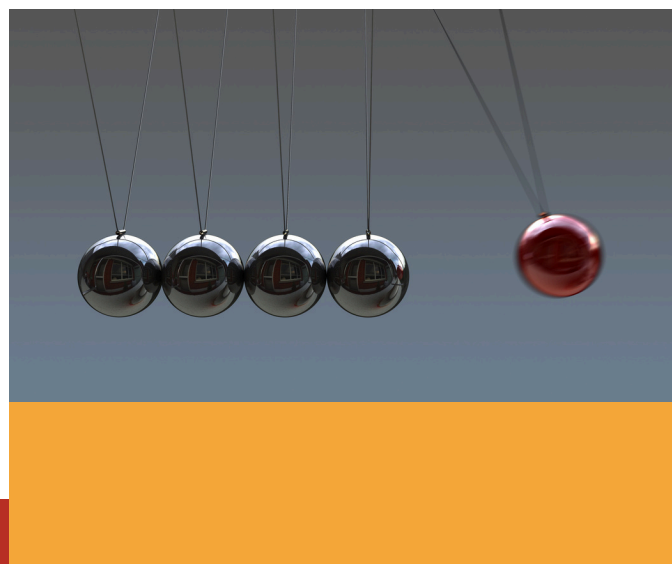
In this guide, you'll learn effective goal-setting strategies and find easy-to-use printable worksheets designed to help you take immediate action.

## Short-term vs. long-term goals

**Long-term** goals are big-picture objectives that span 3-5 years or longer. They act as your "North Star", directing your business to where you want to be in the future.

**Short-term** goals are immediate or near-future targets that act as stepping stones toward achieving your long-term goals.

Managing both types of goals gets easier the more you **break big objectives into bite-sized tasks**. This is how you ensure daily progress while keeping an eye on the future.





## Why SMART goals matters

If you've failed at setting and achieving goals in the past, you might have been using the wrong system.

Try the SMART framework to bring **structure, clarity** and **accountability** to your goal setting efforts.



### Specific

Define exactly what you want to accomplish. Vague goals are useless. Answer the questions of who, what and why!



### Measurable

Always include a way to measure progress or success. Try to set goals that use numbers or concrete criteria that are easy to track.



### Achievable

Goals should be challenging but realistic. Consider your resources and constraints when determining what is possible. Stretch goals can be useful but not in the SMART framework.



### Relevant

Choose goals that matter and move the needle for your business. Every goal should align with your broader business objectives and make sense for your long-term vision.



### Time-Bound

Every goal needs a deadline or timeframe to create urgency and keep you focused. Set a target date for completion and hold yourself accountable to make it happen.

# Habit Stacking

Big goals are reached through consistent daily actions. Habit stacking is a technique to build new habits by attaching them to routines you already have, making it easier to stick with actions that lead to your goals.

**The idea:** use an existing habit as a trigger for a new habit.



## Start small

Pick a simple action related to your goal that takes just a few minutes. Small habits done consistently lead to big results over time.



## Use a trigger

Identify an existing habit or routine in your day, and “stack” the new action onto it.

Think: “After I [*existing habit*], I will [*new habit*].”

## Be consistent

Exercise the new habit every time you complete the existing one. By pairing the two, the old habit reminds you about the new habit. Over time, the behavior will stick and become second nature.

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## Adjust if needed

If one cue doesn't produce results, don't give up! Try a different existing habit as the trigger. The goal is to find a routine that fits naturally with the new action.

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# Tools + tips for tracking progress

To know if you're on track, you need to monitor your progress.

Regular tracking keeps you motivated and accountable.

## Pen and paper

This old school methodology still works best for some people. If writing things out by hand is your preference, be sure to buy a dedicated journal or planner to stay organized.

## Visual trackers

A whiteboard, calendar or poster puts your goals front and center every day. Mark off your tasks or fill in your progress bar as you move closer to your target.

## Spreadsheets

Spreadsheets are great for tracking multiple metrics, making instant updates/changes and having the option to use formulas or charts to identify trends.

## Apps or software

Whether you use an intricate project management tool or a simple to-do app on your phone, task tracking software is great for those who like automated reminders.

## Accountability buddy or team

Share your goals with a friend, mentor, or your team. Quick weekly check-ins keep everyone focused and on track.

Choose the tracking method that fits your style and helps you consistently monitor and record your progress. Seeing how far you've come drives motivation and spotting early if you're falling behind gives you a chance to make changes and catch up!

# Review & Adjust

Setting goals isn't a "set it and forget it" activity - it's a dynamic process. Business conditions change and so might your ambitions.

Regular review and adjustments keeps you proactive and your goals relevant and achievable.



## Schedule check-ins

Set a regular time (weekly, monthly, or quarterly) to review your goals. Put it on your calendar like any important meeting.



## Evaluate progress

Review what you've accomplished. Are milestones being met? Note what's on track, done, or falling behind.



## Recognize win & challenges

Celebrate even small wins. Reflect on what didn't go well and why to uncover new ways you can improve.



## Adjust as needed

Tweak your goals based on progress. Extend deadlines, break things down, or raise the bar when it makes sense.



## Stay flexible & focused

Things change and that's OK. Adjust your goals when necessary as long as you continue to aim for your big-picture vision.





# SMART Goal Planning Worksheet

Detail each element of the SMART framework to convert regular goals into **SMART goals**.

**Specific:** What exactly do you want to accomplish?

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**Measurable:** How will you measure success or know you've achieved it?

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**Achievable:** Is the goal realistic? What resources or steps will you use to attain it?

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**Relevant:** Why does this goal matter for your business? How does it align with your vision?

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**Time-Bound:** What is the deadline or timeframe to achieve this goal?

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Use the information above to write a complete **SMART goal statement**:

*I will... [Specific & Measurable]... by [Timeframe]... using [Achievable]... because [Relevant]*

**SMART Goal Statement:**

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# Habit Stacking Worksheet

Choose 2 new habits to stack on top of existing habits.

1.

**Existing Habit (Cue):** Choose a regular routine that will trigger the new habit.

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**New Habit to Add:** Define a small action you will do **immediately after** the existing habit.

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**Frequency:** How often will you do this habit stack?

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**Motivation:** How does this new habit help you achieve your goals?

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2.

**Existing Habit (Cue):** Choose a regular routine that will trigger the new habit.

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**New Habit to Add:** Define a small action you will do **immediately after** the existing habit.

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**Frequency:** How often will you do this habit stack?

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**Motivation:** How does this new habit help you achieve your goals?

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# Goal Review + Adjustment

Complete this worksheet every quarter or year.

Did you achieve your goal (or this period's target)? YES NO

If not, how close did you get? \_\_\_\_\_

What went well and what achievements are you proud of?

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What obstacles or challenges did you encounter?

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What lessons were learned?

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Do you need to adjust your approach? Extend the timeline? Revise your goal?

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What are your next steps?

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# GET MORE OUT OF YOUR BUSINESS

**Financial  
pain relief is  
coming**

## **Let's start a conversation**

Need help solving your business problems?

Having a conversation is the best way for us to find solutions to get you to where you want to be.

Schedule your complimentary 30-minute video call so we can discuss your goals and the obstacles holding you back.

**We understand  
where you're  
coming from and  
can help you get to  
the other side**

**Call 206.522.0110 or visit  
[proactiveadvisorygroup.com](http://proactiveadvisorygroup.com) to book your  
FREE Discovery Meeting**