



# GOAL SETTING WORKBOOK

FOR SMALL BUSINESS OWNERS

MCCULLOCH *Communications*

# Hey Goal- Getter!

## Happy New Year!



If you're like me, goal setting is at the top of your to-do list! However, traditional goal setting processes don't always work well for small business owners because they don't take a person's whole lifestyle into consideration.

If you want the best chance of moving your business forward in a sustainable way that aligns with your personal values and priorities, you must ensure that the goals you set are informed and influenced by your ideal lifestyle.

That's why I created this Goal Setting Workbook! It's designed specifically for small business owners who want to get ahead, but not at the expense of their personal life.

xo, Amber

**MCCULLOCH** Communications



# Envision

What does your ideal life look like? How do you want to feel?  
What are the things that you want to prioritize in the year ahead?

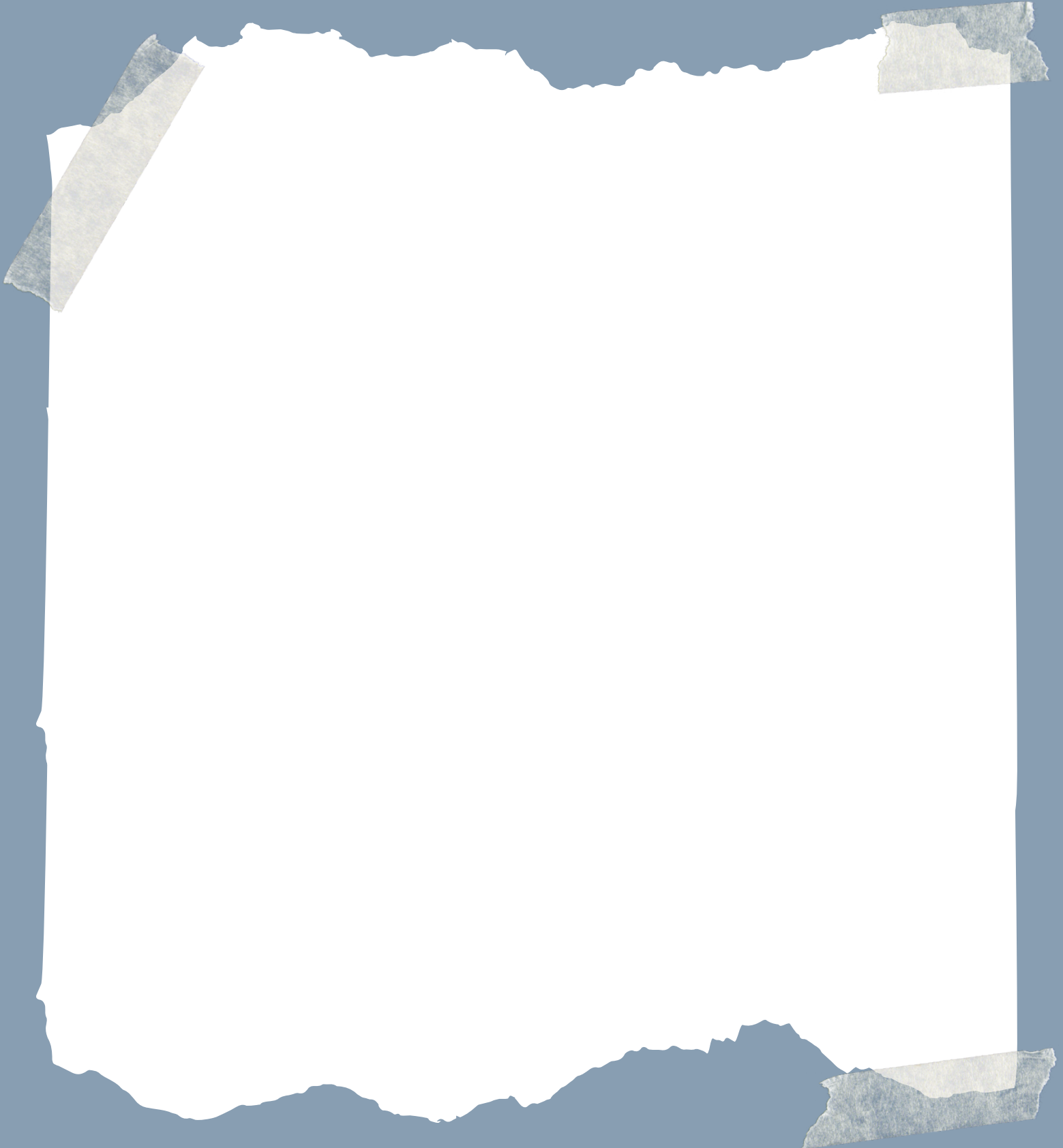
You are not a machine. So goal setting without taking your lifestyle, values, preferences, and personality into consideration is a recipe for disappointment.

Instead, start your goal setting by envisioning your ideal life and outlining your personal goals and values. Keep these in mind as you move into the Business Goal Setting portion of this workbook!



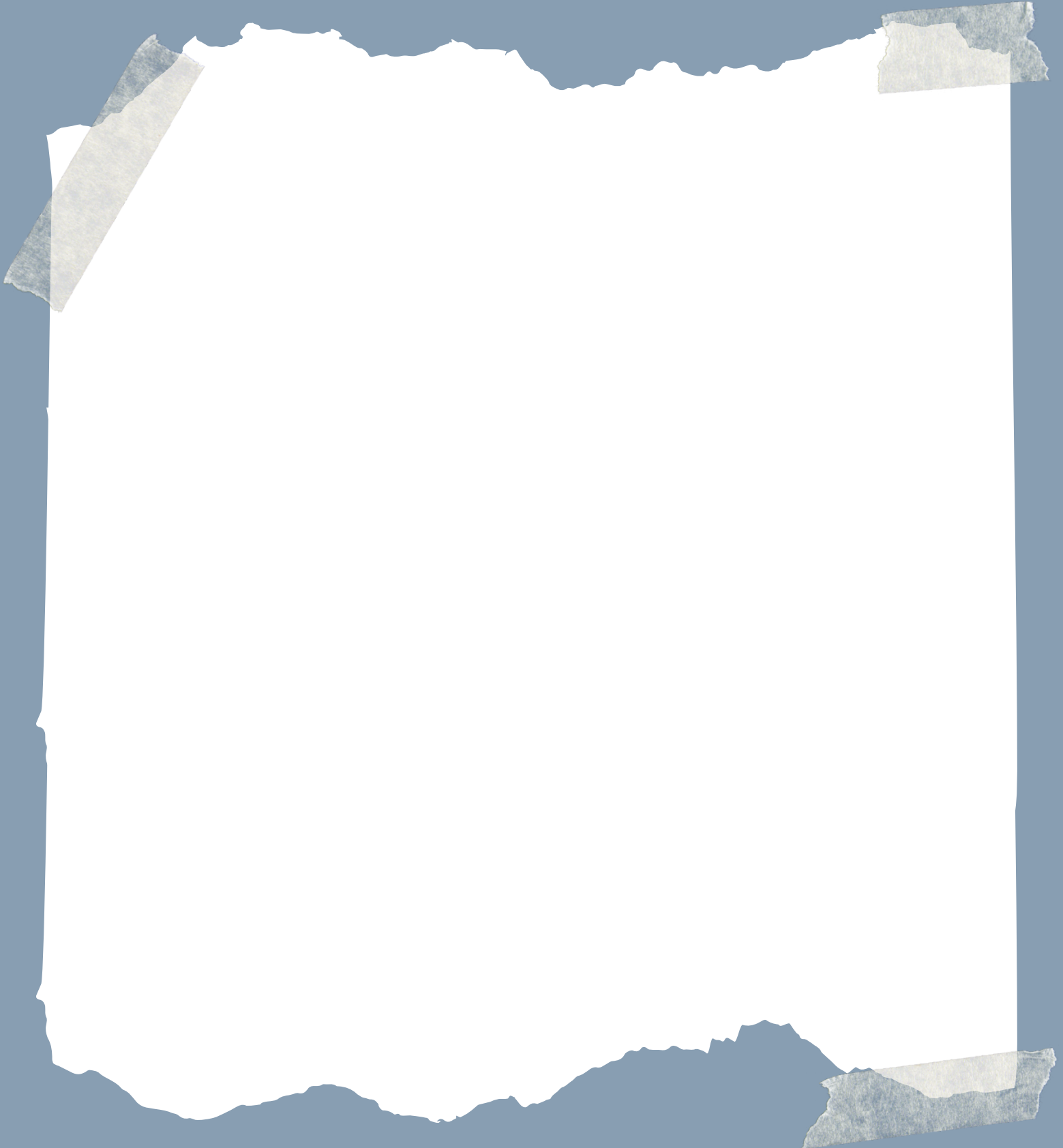
# My Best Life

WHAT DO I WANT MY LIFE TO LOOK LIKE, FEEL LIKE?



# My Best Life

WHAT ARE MY PERSONAL PRIORITIES FOR THIS YEAR?



# My Lifestyle Goals

## PERSONAL GROWTH

## HEALTH & WELLNESS

## FAMILY

## RELATIONSHIPS

## HABITS

## MINDSET

# My Lifestyle Goals

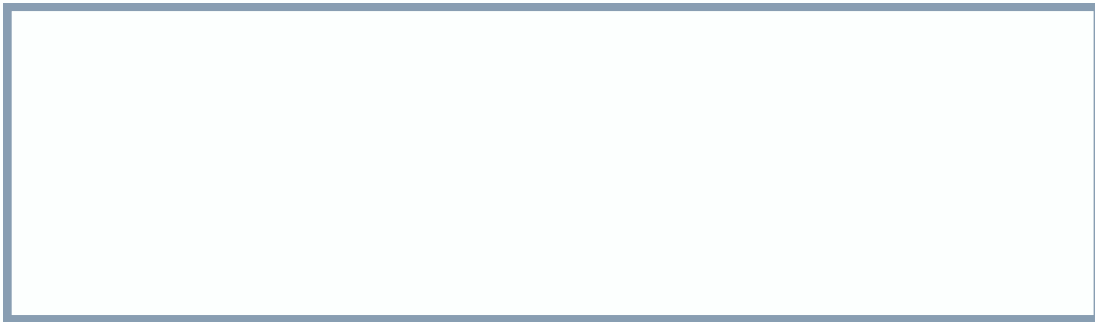
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# Lifestyle Goal Assessment

HOW WILL THESE LIFESTYLE GOALS IMPACT MY BUSINESS?

A large, empty rectangular box with a thin blue border, intended for the user to write their response to the question above.

WHICH LIFESTYLE GOALS TAKE PRIORITY OVER MY BUSINESS GOALS?

A large, empty rectangular box with a thin blue border, intended for the user to write their response to the question above.

TO SUCCEED IN MY BUSINESS, I MUST HAVE BALANCE & BOUNDARIES.  
WHAT WILL THEY BE?

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# Set Goals

Now that you have an idea of your personal goals and how you want to live your life in 2023, it's time to set some goals for your business.

I've included several pages to help you brainstorm ideas. Assess each one in light of your personal values and preferences and then choose a few top goals to focus on for the year.

Your goals should be ambitious, but achievable!

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# My Business Vision

WHAT DO YOU WANT YOUR BUSINESS TO LOOK LIKE, FEEL LIKE?



*In my business, I want to...*

STOP  
DOING

DO  
LESS OF

KEEP  
DOING

DO  
MORE  
OF

START  
DOING

# Business Goals Brainstorm

EMAIL MARKETING

SOCIAL MEDIA

PRODUCTS/SERVICES

CUSTOMER SERVICE

ADVERTISING

EVENTS/NETWORKING/OTHER

# Business Goals

CONTINUED

# Goal Assessment

REVIEW YOUR LIST OF GOALS AND HONESTLY REFLECT ON THE FOLLOWING QUESTIONS.

1

What is it really going to take to achieve this goal? Consider the time, energy, money, etc. Are you willing to commit to this goal?

2

What resources do you need to pursue and accomplish this goal? Do you have access to these resources?

3

Is there something holding you back from pursuing this goal? Is it fear? Are there obstacles that you can identify and trouble shoot before taking it on?

4

Is this goal ambitious enough? Is it too ambitious? Can you adjust this goal so that it is both ambitious AND achievable?

5

Does this goal align with my personal values and goals? How can I reformulate it so that it does?

CHOOSE 5 OF YOUR BEST BUSINESS GOALS TO FOCUS ON THIS YEAR.

# My Top Business Goals for the Year

## GOALS

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# Break it Down

Big goals are less overwhelming when you break them down into mini goals and action steps.

This is a critical step in the goal setting process and will help you formulate a plan and timeline for the year.

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# Make a Plan

Don't make the mistake of trying to tackle all of your goals all at once. Consider the seasonality of your life and your business and schedule your business efforts accordingly.

Many of your goal timelines will overlap, so use the quarterly worksheets to get a clear picture of what you'll be focusing on each month.

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YEAR: \_\_\_\_\_

# Big Goal Yearly Timeline

JANUARY	
FEBRUARY	
MARCH	
APRIL	
MAY	
JUNE	
JULY	
AUGUST	
SEPTEMBER	
OCTOBER	
NOVEMBER	
DECEMBER	





# Q2 Action Plan

Make a plan for quarter 2



YEAR:

## BUSINESS GOALS

- .....
- .....
- .....

## PERSONAL PRIORITIES

- .....
- .....
- .....

## APRIL

### ACTION STEPS:

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### DUE DATE:

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## MAY

### ACTION STEPS:

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### DUE DATE:

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## JUNE

### ACTION STEPS:

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### DUE DATE:

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# Q3 Action Plan

Make a plan for quarter 3



YEAR:

## BUSINESS GOALS

- .....
- .....
- .....

## PERSONAL PRIORITIES

- .....
- .....
- .....

## JULY

### ACTION STEPS:

- .....
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### DUE DATE:

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## AUGUST

### ACTION STEPS:

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### DUE DATE:

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## SEPTEMBER

### ACTION STEPS:

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### DUE DATE:

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# Q4 Action Plan

Make a plan for quarter 4



YEAR:

## BUSINESS GOALS

- .....
- .....
- .....

## PERSONAL PRIORITIES

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- .....
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## OCTOBER

### ACTION STEPS:

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### DUE DATE:

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## NOVEMBER

### ACTION STEPS:

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### DUE DATE:

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## DECEMBER

### ACTION STEPS:

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- .....
- .....

### DUE DATE:

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# Reflect & Adjust

At the end of each quarter, it's important to reflect on what you accomplished and what got pushed or fell off of your to-do list. This is not the time to chastise yourself or feel bad about what you weren't able to accomplish. Instead, look at your track record like a scientist.

First, record and celebrate your wins! Then assess what worked for you and what didn't. What challenges did you face? What resources are needed to move forward? Readjust your goals, your plan, and your calendar for the next quarter.

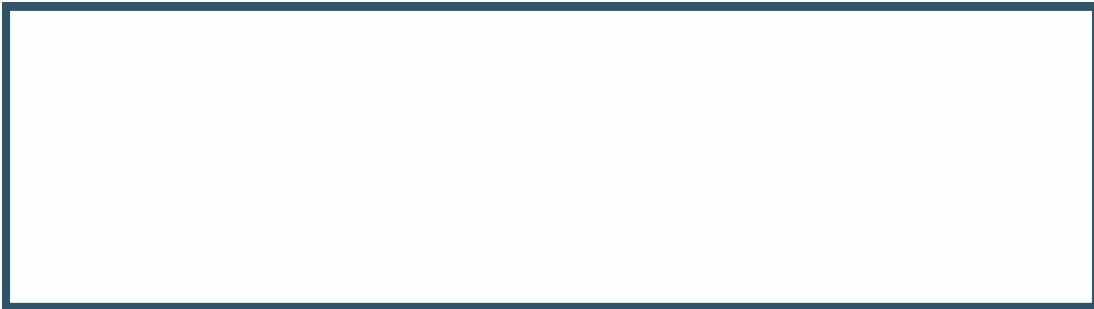
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# Quarterly Reflection

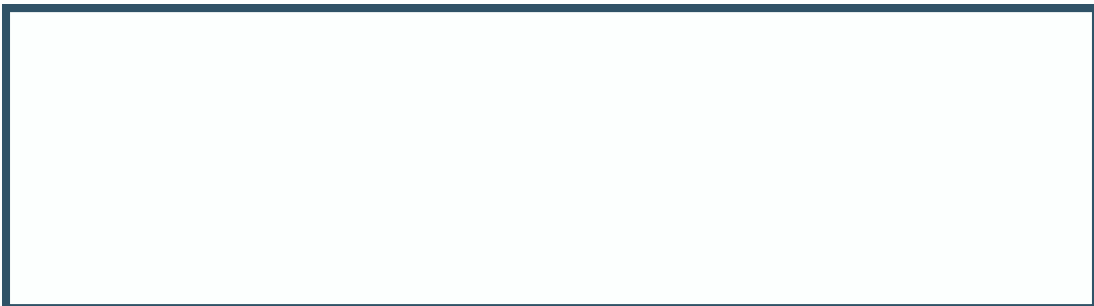
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WHAT CHANGES DO I NEED TO MAKE TO MY GOALS/PLAN TO SET MYSELF UP FOR SUCCESS NEXT QUARTER?

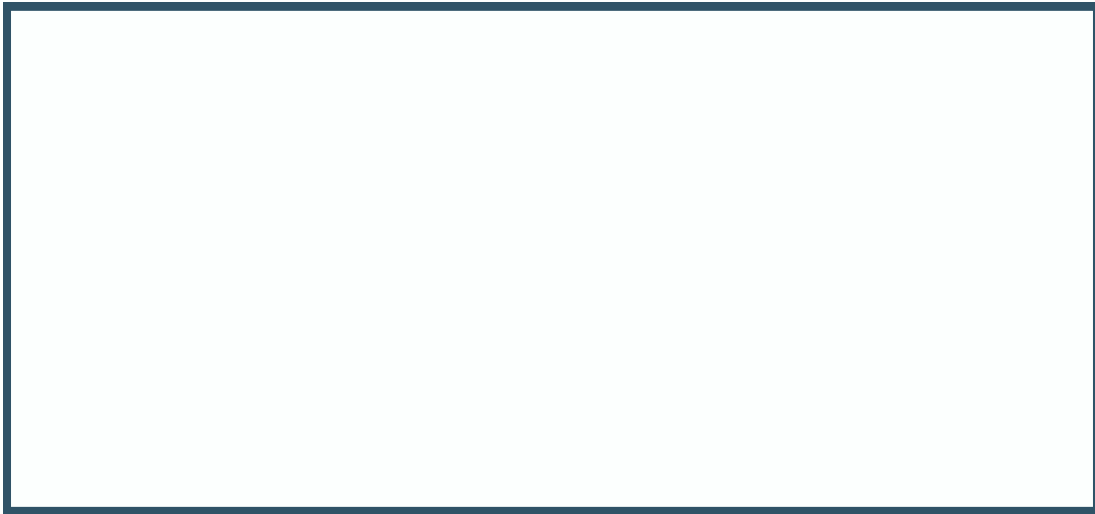


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WHAT CAN I DO TO CHANGE THAT?

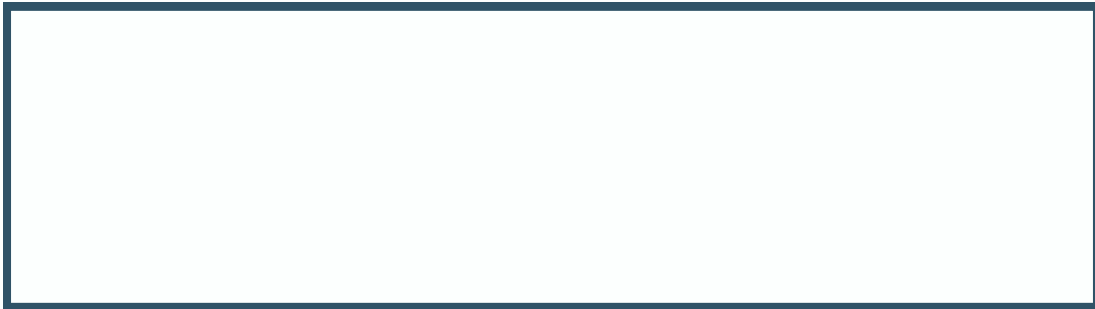


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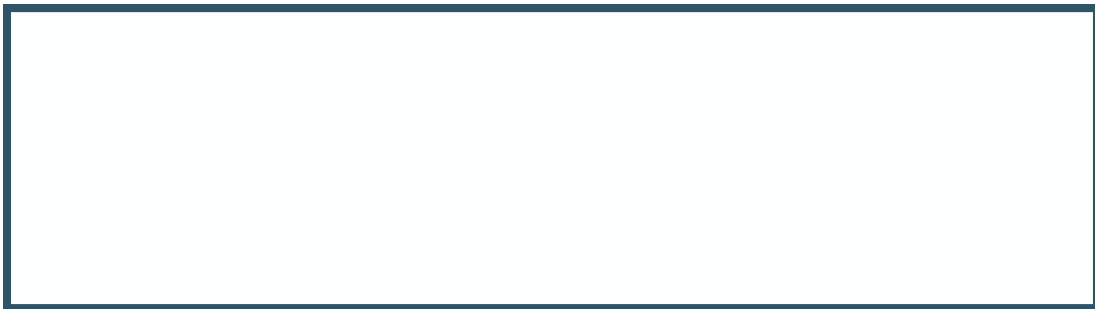
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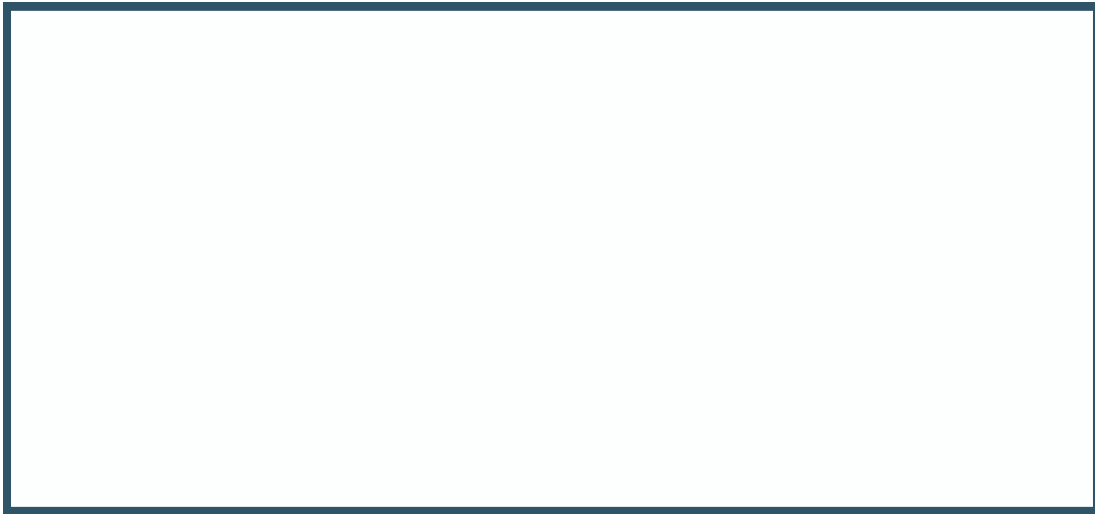


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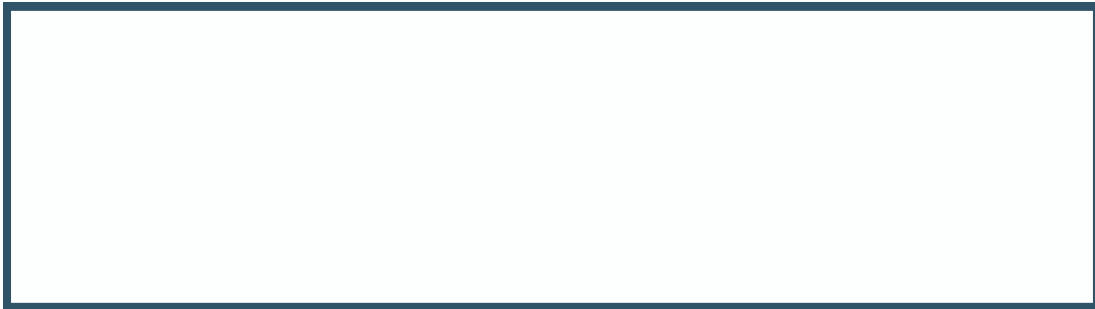


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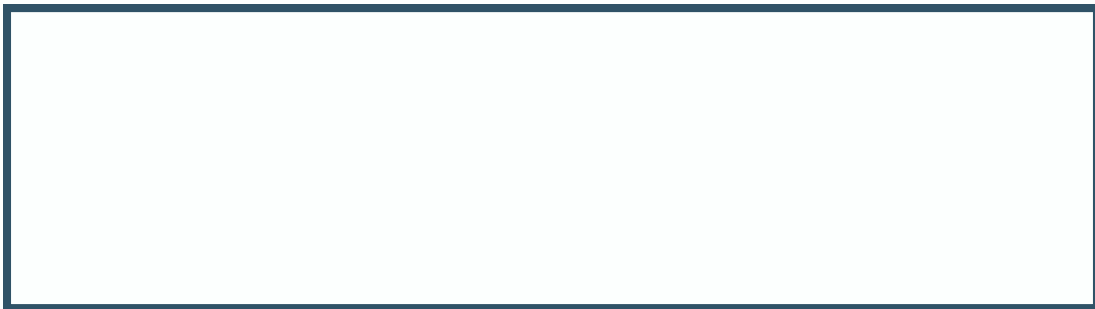
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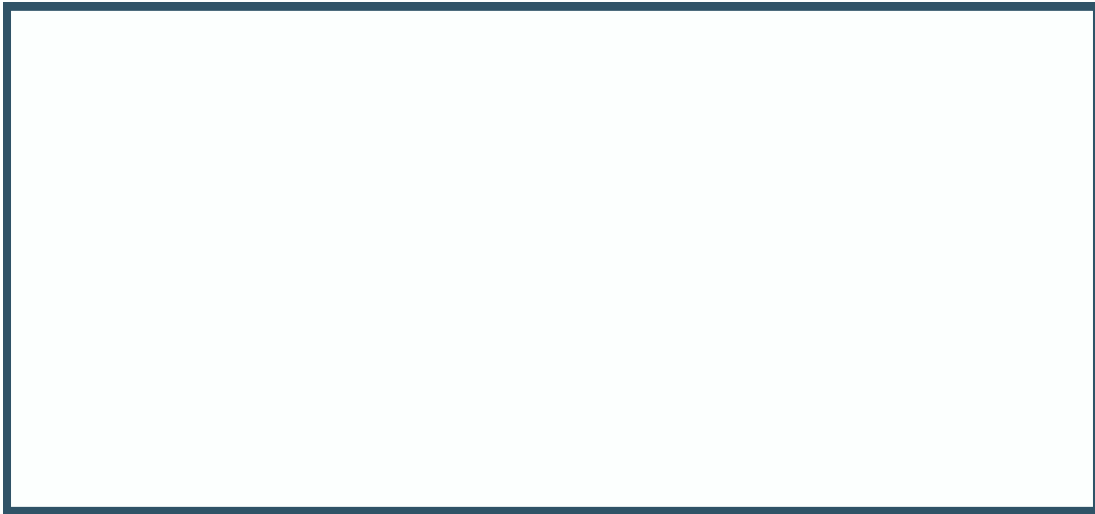


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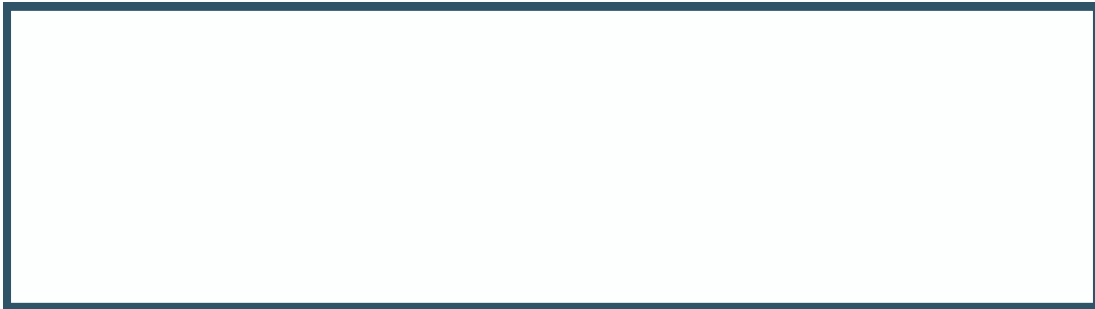


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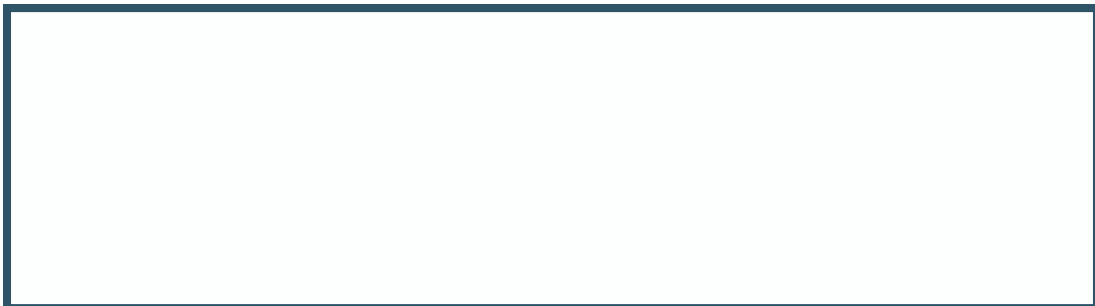
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*Remember: The pursuit of every dream comes with a trade-off. Your best chance of success is to set goals that align with your personal values and lifestyle.*

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Thank you!

*Thank you so much for downloading this workbook. I hope you find it useful and can immediately put it into practice. If you have any questions, please don't hesitate to reach out!*

*xo,*

*Amber @mccullochcomms*

## **WANT MORE GREAT CONTENT?**

Visit [mccullochcommunications.com](https://mccullochcommunications.com) for more tools and resources specifically for small business owners like you!

[VISIT MY WEBSITE](#)

