

Find The One Thing To Hack Your Success



Planning is vital to business success, planning strategically is even more important. Do you know the one thing that is holding you back from success?

That's why we've devised this handy Strategic Planning Process Checklist!

This worksheet will assist you to break your new working year into easily-achievable 3-month goals – 90-day sprints that make your ultimate goals more tangible and help you figure out the one thing you need to achieve them.

Here's how you do it.

BIG GOALS – 12-month goals

What are your 12-month goal/s for your business?

1. _____
2. _____
3. _____



MEDIUM GOALS – 6-month goals

They say a problem shared is a problem halved, and we can break goals up into manageable blocks too. Keeping in mind what your BIG goal/s are – what are the steps you need to take in the medium term to achieve them? Practically speaking, you can halve your 12-month goals!

1. _____
2. _____
3. _____



SMALL GOALS – 3 & 9-month goals

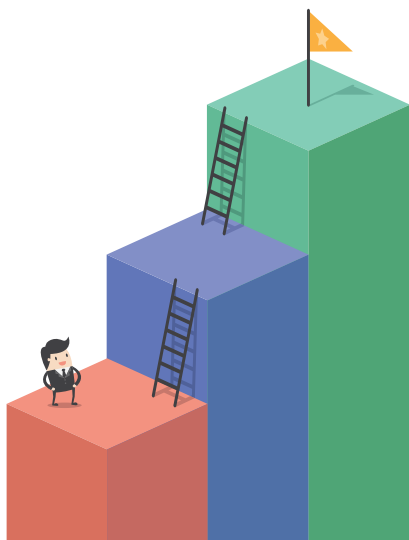
Again, using your BIG goals as a basis for setting small goals, you can figure out what your 3 & 9-month goals are in one of two ways:

- A. By dividing your 6-month goal by 2 you get your 3-month goal. Now add the result to your 6-month goal to get your 9-month goal.
- B. Take your 12-month goal/s and divide it by 4 to get a 3 & 9-month result.

Example:

If you want 100 new clients in 12 months you would do the following:

- $100/2 = 50$ (6-month goal)
- $50/2 = 25$ (3-month goal)
- Then (6-month goal + 3-month goal)
- $50 + 25 = 75$ (9-month goal)

**9-month goal/s**

1. _____
2. _____
3. _____

3-month goal/s

1. _____
1. _____
2. _____



What is the ONE THING you need to make these goals happen?

Take the goal/s you have listed above in the BIG Goals section, based on your 9, 6, 3-month goals write the top 3 activities you need to do for these goals to be achieved.

Goal 1: _____

1. _____
2. _____
3. _____

Goal 2: _____

1. _____
2. _____
3. _____

Goal 3: _____

1. _____
2. _____
3. _____

Then, place the corresponding letter next to them (**T, M, S, D**) that you believe you will need to achieve that particular goal. Be Honest.



T = Time



M = Money



S = Skills



D = Discipline

Example:

Goal 1: 100 new clients in 12 months

1. Time to dedicate to Business Development activity
2. Research new clients
3. Time to visit, see and engage new clients

T
T & D
T
T



What is the most common theme? (T, M, S, D)



What are the 3 immediate things you can do to assist in addressing your one thing?

1. _____
2. _____
3. _____

Example:A. TIME

The most dominant factor in gaining 100 clients this year is TIME. If time is the prohibiter in achieving the goal, the 3 things I can do are:

1. Delegate administration tasks to a staff member, like research of potential clients, paperwork, responding to enquiry emails, social media posts
2. Block out 1 hour per day to call and email new leads/potential clients or select 1 day a week to block out 2-3 hours call & email.
3. Dedicate 1 day a week to meetings, all external meetings scheduled on one day (maybe 2).

**Change one thing
and change everything**