

**GOAL** WHAT DO I WANT TO HAPPEN?

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**MEASURES** HOW WILL I KNOW I SUCCEEDED?

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**CHALLENGES & SOLUTIONS** ADDRESS & OVERCOME.  
(WHAT ARE THE BIGGEST CHALLENGES TO MY EFFORT? HOW WILL I ADDRESS THEM?)

**1**

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**2**

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**3**

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**ACTION ITEMS** WHAT ARE MY NEXT STEPS?

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# THE EXERCISE

**The Quick Goal Setting Sheet** – This is a super-quick, down-and-dirty goals list that should take only about 30 minutes to think through. And it's pretty easy—set your goal, and work through each step down the page.

## GOAL WHAT DO I WANT TO HAPPEN?

*To get more clients in 2015.*

## MEASURES HOW WILL I KNOW I SUCCEEDED?

*We will increase our revenue by 10% and our clients by 5.*

## CHALLENGES & SOLUTIONS ADDRESS & OVERCOME.

(WHAT ARE THE BIGGEST CHALLENGES TO MY EFFORT? HOW WILL I ADDRESS THEM?)

- 1 No time to prospect – Build in five hours per week solely for prospecting.*
- 2 No pipeline in process – Build a leads list and enter into new CRM system.*
- 3 No ongoing sales effort – fund separate, fulltime sales position by Q2 2015.*

## ACTION ITEMS WHAT ARE MY NEXT STEPS?

- 1. find new CRM system and enroll. no later than 1/31/15.*
- 2. set prospecting schedule into calendar*
- 3. Email staff for personal contacts for start of leads list.*
- 4. Meet with HR about possible new position requirements in Q2.*
- 5. Email PrintCorp re: new mailing list for leads list.*