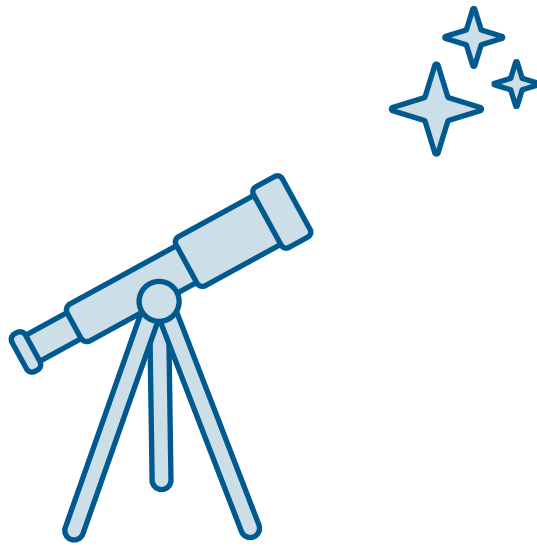


The Small Business Guide *to* Setting Value-Driven Goals for the New Year

A Workbook by Esultants Web Services
esultants.com



It's the beginning of a brand-new year for your business, which means a brand-new chance to become the business you set out to become when you started.

But you've been around long enough to know that just ***dreaming*** of change doesn't make it happen—you need to set specific goals and map out a plan for accomplishing them.

In this workbook, we'll go through the five steps we believe to be crucial to **setting and, more importantly, to **achieving** value-driven goals for your business, your employees, and yourself:**

STEP 1: DREAM ABOUT YOUR FUTURE

STEP 2: REFLECT ON YOUR PAST YEAR

STEP 3: SET GOALS

STEP 4: CREATE ACTION STEPS

STEP 5: STAY FLEXIBLE

Tips for Using This Guide

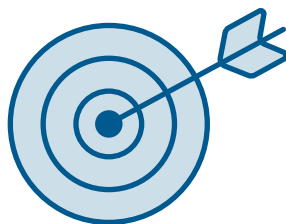
INCLUDE OTHERS IN YOUR PLANNING PROCESS

Even if you're the only **official** employee for your business, you aren't doing this alone. Include as many of your colleagues (or friends and family if you're a one-person show) in this process as makes sense.

Consider giving the worksheets to each person you want to be involved and schedule a 30-to 45-minute meeting to discuss your notes. We recommend taking a few weeks to complete this workbook, so think about sweetening those meetings with snacks!

KEEP THE "WHAT WE VALUE" PAGE HANDY WHILE YOU PLAN

To get the most out of this workbook, you need to be well acquainted with your and your company's values.



Let's start at the heart.

You can't set value-driven goals without knowing your values. Your company's values are its heart and soul—what could be better to drive your goals and your next year? On the next page, you will copy your mission statement or core values if you have them already set or you'll brainstorm ideals you want to incorporate into your goal-setting.

Print off as many copies as you need. Brainstorm in words, phrases, pictures, or best-case scenarios. Add as much style or color as you want.

Take your time to make "What We Value" something you're proud to display at each of your meetings throughout the year. ***It doesn't have to be Pinterest-perfect,*** it just needs to be understandable.

What We Value

Step 1: Dream about Your Future

Start by dreaming about how your mission statement could come to life.

In a television writer's room, they call this the "blue sky" period, a time when everyone is free to share their ideas, no matter how far-fetched, without criticism.

It is a practice built on the concept that the best ideas come from confidence and the unregulated creativity which comes from temporarily forgetting the circumstances keeping us tied to the ground.

In the next steps, we'll reflect on last year to bring reality back in, and then we'll set specific goals for your business—but for now, work on dreaming big and quiet your inner critic to find ideas that just might work. Don't shut down any idea, regardless of how infeasible or unattainable it might be.



ASSIGNMENT

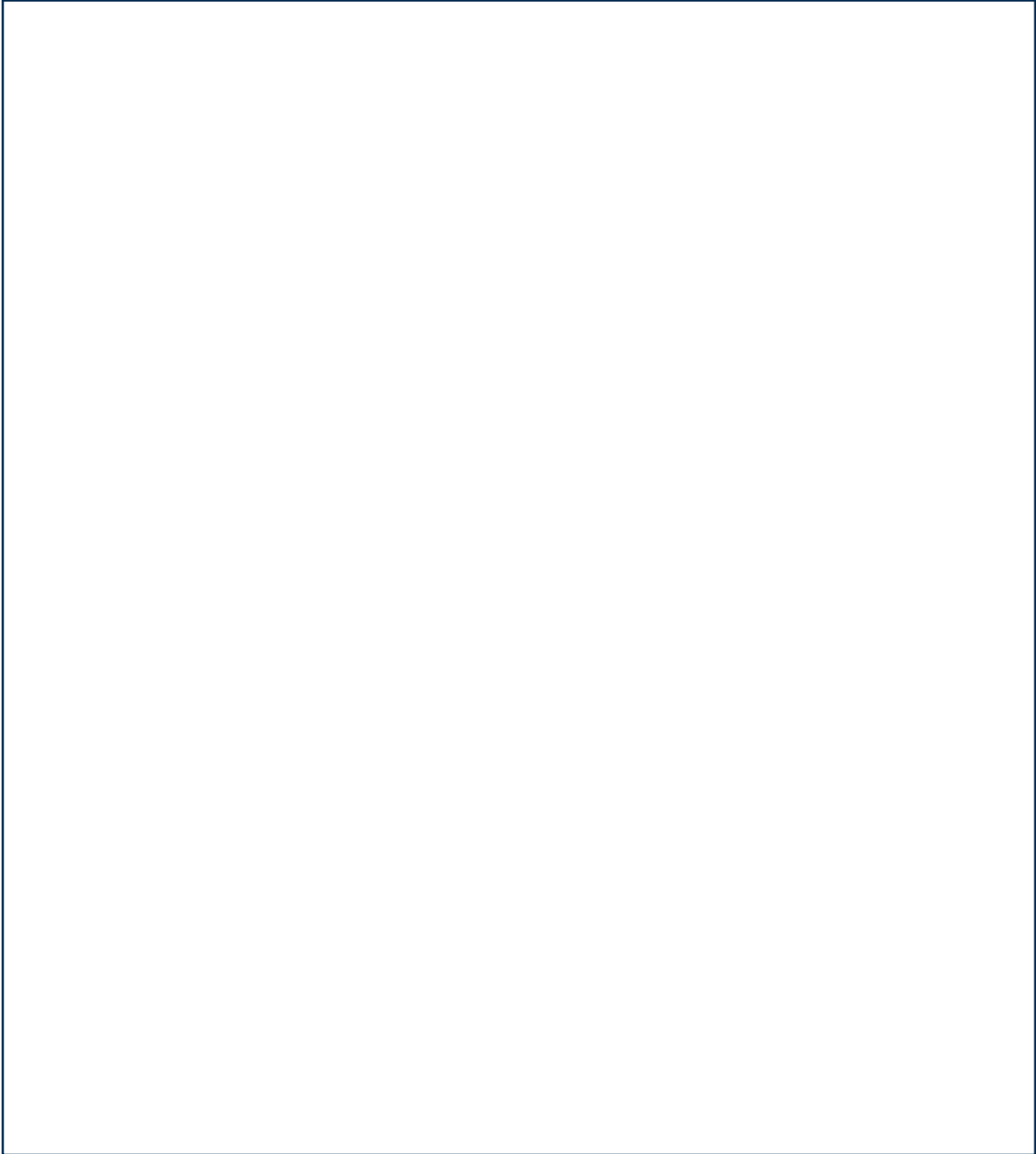
Set the timer for 30 minutes, and work with your team to make a list of things your business could accomplish or provide if nothing was holding you back. Remind everyone to keep back their criticism and "reality checks" for the time being.

We recommend using a large dry-erase board or paper tablecloth or giving each team member multiple post-it notes to brainstorm on. Then summarize below. Take a picture of the white board or stick all the post-it notes on a blank page and add it to your workbook.

Tip: If you need an extra push to be more creative and less critical, use crayons or markers and a combination of writing and doodling.

"IF YOU WANT TO BE HAPPY, SET A GOAL THAT COMMANDS YOUR THOUGHTS, LIBERATES YOUR ENERGY AND INSPIRES YOUR HOPES." —ANDREW CARNEGIE

WHAT OUR BUSINESS LOOKS LIKE IN OUR WILDEST DREAMS:



"IF YOU HAVE BUILT CASTLES IN THE AIR, YOUR WORK NEED NOT BE LOST; THAT IS WHERE THEY SHOULD BE. NOW PUT THE FOUNDATIONS UNDER THEM." —HENRY DAVID THOREAU

Step 2: Reflect on Your Past Year

Now that you've fallen in love with potential during the dreaming session, it's time to consider your company's present reality by remembering the past.

ASSIGNMENT

Use the following prompts to kick start your reflection on last year. *Tip: You might want your work calendar or a list of the projects you worked on for reference.*

**WHAT ARE YOUR HIGHLIGHTS FROM THE PAST YEAR?
(MORALE, GROWTH, DEVELOPMENT, FAVORITE CUSTOMERS OR PROJECTS)**

**WHICH GOALS FROM LAST YEAR
DID YOU ACCOMPLISH?**

**WHICH GOALS DID YOU FAIL TO
REACH? WHAT HELD YOU BACK?**

WHAT WAS YOUR #1 VICTORY?

YOUR GREATEST CHALLENGE?

DID ANY OBSTACLES OR TIME-WASTERS *SIGNIFICANTLY* HOLD YOUR TEAM BACK? COULD ANY TASKS BE DROPPED, DELEGATED, OUTSOURCED?

WERE THERE TIMES YOU OR YOUR TEAM WERE DISCOURAGED? WHEN? WHAT SUPPORTS HAVE BEEN PUT IN PLACE FOR THE FUTURE?

HOW DID YOUR INDUSTRY CHANGE OVER THE LAST YEAR?

“SOMETIMES YOU HAVE TO LOOK BACK IN ORDER TO UNDERSTAND THE THINGS THAT LIE AHEAD.” —YVONNE WOON

Step 3: Set Goals for This Year

To set goals for this new year, we will reconcile the idealism from the first exercise with the reality of your company's last year. Maybe some ideas from Step 1 need to be brought down to earth. Perhaps a few just don't align with your business' mission or core values. (If so, remove them from your company's goals and rework those ideals into [professional or personal goals for yourself](#).)

ASSIGNMENT

How can you improve upon last year, considering your company values, your wishlist from Step 1, and your answers in Step 2? We'll dig in deeper in Step 4.

**WHAT DREAMS CAN WE GET CLOSER TO REACHING THIS YEAR?
WHICH GOALS WOULD SHOW IMPROVEMENT FROM LAST YEAR?**

Visit esultants.com/resolutions for personal and professional goal planning worksheets.

**"SETTING GOALS IS THE FIRST STEP IN TURNING THE
INVISIBLE INTO THE VISIBLE." —TONY ROBBINS**

Step 4: Identify Actions and Resources

S.M.A.R.T. goals are *Specific, Measurable, Achievable, Relevant, and Time-Bound*.

Underline, highlight, or star 3–5 notes from Step 3 that could be made into smarter goals. *For more information about S.M.A.R.T. goals, read esultants.com/smart-goals*

Most worthwhile business goals can't be accomplished in just a day or even a week. Oftentimes they require an ongoing commitment and effort to reach that main objective. In this step, we'll divide your goals into achievable actions and determine what resources you'll need to complete each step.

First, make sure your goals are S.M.A.R.T., especially achievable, measurable, and relevant to your values.

To make a goal more *Specific*, ask “How?” and “What specifically?” “Get more customers”—How? “By improving our website.” What specifically about the website? “The user experience on mobile, since most visit our site via their phones.”

To make a goal *Measurable*, you need to track data. If Google Analytics is set up on your site, you can measure the bounce rate, number of sessions, and percentage of mobile users from one year to the next.

An *Achievable* goal is one that is feasible given your current situation and resources. While aiming high is admirable, don't set yourself up for failure. Choose a goal that you know you have a chance of accomplishing.

A *Relevant* goal is relevant both to your company values as well as to the needs of your target market. Relevance is key to creating motivation behind the goal.

A *Time-bound* goal is one with an ultimate deadline as well as a deadline per month or action step. Build in buffer time at each step and remember that vague or unnecessarily urgent deadlines can deplete morale.

**“OUR GOALS CAN ONLY BE REACHED THROUGH A VEHICLE
OF A PLAN IN WHICH WE MUST FERVENTLY BELIEVE,
AND UPON WHICH WE MUST VIGOROUSLY ACT.
THERE IS NO OTHER ROUTE TO SUCCESS.” —PICASSO**

Second, divide your goals into smaller action steps.

Third, determine exactly what resources you'll need to complete each step. On the next page, answer the following questions for each step of every goal:

WHO: Who will be in charge of making this goal happen? Who in your company is the leader, and whom might they delegate to (new employee, existing employee, agency)?

WHAT: What tools will you need to achieve the goal (classes, books, software)?

WHEN: What is the deadline for this step and the goal? How long will each step take? In your work calendar, schedule deadlines and chunks of time to work on your goals.

HOW: How much will it cost to complete each step (fees for tools, additional or promoted salaries, cost of educational materials, outsourcing rate)?

ASSIGNMENT

For each of your goals, fill out at least one copy of the worksheet on the following page. For more action steps, print off additional copies.

REMEMBER:

As you're determining the essential resources for each of your goals, consider the time or money that will be put into both: You can spend *your time* on a project, or you can spend *money* to have *someone else do it*.

While you make your decision between these two fundamental resources, keep in mind that they are both finite for you and your staff. For example, if you decide to manage social media in-house, consider how these additional job requirements will affect the designated employee's workload. You will need to arrange for another way for their original tasks to get done or pay to increase their hours.

While outsourcing the work can seem expensive, don't forget that **your time is valuable, too.**

GOAL:

ACTION STEP:

#

WHO:

WHAT:

WHEN:

HOW:

ACTION STEP:

#

WHO:

WHAT:

WHEN:

HOW:

ACTION STEP:

#

WHO:

WHAT:

WHEN:

HOW:

Step 4: Stay Flexible

Things won't always go as expected, even if you build buffer time into your deadlines (and you should!). The internet is full of articles about how to make your plans work out, but no matter how much you organize and remove distractions, we're still human, and things come up that are out of our control.

Family emergencies, staffing problems, and unforeseen *drop-everything-else-and-get-this-done* work can all become barriers in the way of achieving our goals. Instead of getting discouraged when the unexpected breaks in, give yourself a breather, readjust your expectations, and keep moving in the right direction, whatever that may look like under these new circumstances.



Tips for Facing the Unexpected:

ASK FOR HELP.

Delegating at work can be difficult, but if you are feeling overwhelmed with your projects and deadlines, sharing some of the workload could be the best thing for you and your company as a whole.

POSTPONE A DEADLINE.

This isn't always possible, but if you set up your deadlines and check-ins with some margin, you'll have the freedom to move things around later.

REMEMBER WHY YOU SET THE GOAL.

When we're stressed, it's easy to focus on the details and forget the big picture. Instead of getting frustrated that you aren't reaching the specific goal you wrote down, remember what made that goal important to you, how it was supposed to bring your business closer to living out your mission statement, and consider how a different—possibly more achievable—goal could move you in the same direction.

**“PLAN WHAT IS GOOD, USEFUL, AND ATTAINABLE,
IDENTIFY THE MEANS TO ACHIEVE THOSE ENDS, AND
ADJUST ACTIONS ACCORDING TO REASON AND HEALTH.”
—ARISTOTLE, *NICOMACHEAN ETHICS* (PARAPHRASE)**

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