

BUSINESS GOALS

How to Use This Worksheet

Use this worksheet to clarify your business goals.

These will help shape your business strategy and ensure alignment with your values.

Financial Goals

1. Increase profit margin - Improve efficiency and pricing to keep more of what you earn
2. Grow revenue - Expand sales through new clients, products, or market reach
3. Improve cash flow - Create predictable income and reduce payment delays
4. Pay yourself a consistent salary of \$X monthly - Stop feast-or-famine personal income
5. Diversify income streams - Reduce risk by having multiple revenue sources
6. Build financial reserves - Create 6-12 months operating expenses as safety net
7. Eliminate business debt - Reduce interest payments and financial stress
8. Reduce dependency on loans - Build self-sustaining cash flow
9. Optimise tax strategy to save \$X annually - Keep more profit through smart planning
10. Scale sustainably - Grow without destroying profit margins or quality
11. Maximise return on investment - Get better results from marketing and business spending
12. Plan for exit or succession - Position business for future sale or handover
13. Increase personal income by \$X annually - Grow your take-home pay year over year
14. Generate passive income streams - Create revenue that doesn't require active time
15. Reduce expenses without impacting quality - Cut costs while maintaining standards



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Strategic Goals

1. Expand into new markets - Reach different demographics, locations, or industries
2. Enhance brand reputation - Be known as the go-to expert in your field
3. Improve systems and processes - Streamline operations for efficiency and consistency
4. Innovate products/services - Stay ahead of competition with new offerings
5. Build strategic partnerships - Collaborate for mutual growth and referrals
6. Achieve market leadership position - Become the #1 choice in your niche
7. Develop signature methodology - Create proprietary processes that differentiate you
8. Strengthen community presence - Build local connections and reputation
9. Create scalable business model - Design systems that grow without proportional effort
10. Build waiting list for services - Have more demand than you can immediately fulfil
11. Establish thought leadership - Be recognized as an industry expert and influencer
12. Develop multiple product tiers - Offer options at different price points
13. Create barriers to competition - Build moats that protect your market position
14. Achieve industry recognition - Win awards, speak at conferences, get media coverage
15. Build intellectual property portfolio - Develop copyrightable/trademarkable assets



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Personal Goals

1. Achieve better work-life balance - Set boundaries between business and personal time
2. Work fewer hours - Maintain or increase income while reducing time commitment
3. Take longer holidays without income loss - Build business that runs without you
4. Work from anywhere - Create location independence and flexibility
5. Plan for retirement or lifestyle goals - Build business that supports future dreams
6. Reduce stress and overwhelm - Create calmer, more organized business operations
7. Automate 80% of routine business tasks - Free up time for high-value activities
8. Delegate operational work - Focus only on what you do best and enjoy most
9. Build family legacy/generational wealth - Create something that outlasts you
10. Pursue passion projects - Have time and resources for creative or charitable interests
11. Become a mentor to others - Share knowledge and help other business owners succeed
12. Achieve financial independence - Build wealth that supports chosen lifestyle
13. Create flexible schedule - Work when and how you want to work
14. Build confidence in decision-making - Develop skills to make strategic choices easily
15. Enjoy the work again - Rediscover passion and fulfillment in your business

