

your business
**goal setting &
strategy planner**

how to use this guide

small, intentional decisions add up

This guide isn't designed to be a "set and forget" plan. It's a practical tool you can come back to regularly as your business evolves.

You don't need to get everything perfect from the start. Progress matters far more than perfection, and small, consistent check-ins will always beat a plan that's created once and never revisited.

This guide is for busy business owners who want more clarity and direction, without spending hours planning or overcomplicating things.

How often to use it

- **Monthly:** a quick check-in to review progress and make small adjustments
- **Quarterly:** a deeper review to reassess goals, priorities, and direction

How long it takes

- **30–60 minutes** to work through the guide the first time
- Ongoing reviews can be completed much more quickly once you're familiar with the process

Use this guide as a working document — something that supports your decisions, keeps you focused, and helps you stay aligned with where your business is heading.

"Business is hard. Marketing is confusing.

"You don't need to have it all figured out — you just need a clear next step that you take action on, and hold yourself accountable to.

"You've got this. "

Anna
Director
Innovate Digital

start with the big picture

before tactics, zoom out.

Before you think about marketing channels, campaigns, or to-do lists, take a moment to step back and look at the bigger picture for your business.

Reflect on the questions below:

- What does success realistically look like for your business this year?
- How do you want your business to feel by the end of the year (for you and your team)?
- If you looked back in 12 months, what would make you say, “That was a good year”?

There are no right or wrong answers here. Be honest, practical, and realistic.

Use the space below to capture your thoughts.

This can be one short paragraph or a simple bullet list — whatever feels easiest.

choose 1-3 core business goals

keep it intentionally limited

Before writing anything down, remind yourself:

more goals ≠ more progress.

This exercise is about focus. Choosing fewer goals helps you direct your time, energy, and resources towards what will genuinely move your business forward this year.

If everything is a priority, nothing is.

A few examples (to get you thinking):

- Increase consistent, qualified leads
- Improve brand visibility or awareness
- Grow revenue sustainably
- Reduce reliance on referrals
- Improve profitability or cash flow

Your goals don't need to be perfect — they just need to be clear and realistic.

Goal 1:	Goal 2:	Goal 3:

translate business goals into marketing goals

this is where strategy turns into action.

This section helps you connect what you want to achieve with what your marketing needs to do. Your marketing goals should be specific enough to measure, but realistic based on your time and resources.

Important to remember:

- Business goals and marketing goals are not the same
- Marketing exists to support the business goal — not the other way around

For each business goal you chose earlier, write one clear marketing goal that directly supports it.

Example:

Business goal: Increase revenue

Marketing goal: Generate X qualified leads per month

Business Goal (what you want to achieve)	Marketing Goal (how marketing supports it)

set time-bound, achievable targets

Introduce structure without overwhelm.

This step helps turn your marketing goals into something you can actually track and review — without setting unrealistic expectations.

Rather than planning the entire year in detail, focus on what's achievable in the next 90 days. This keeps your goals realistic, flexible, and easier to adjust as you go.

Ask yourself:

- What do I want to see change in the next 90 days?
- What's realistic with my current time, budget, and energy?

Marketing goal	Timeframe	Success metrics	Baseline success
le: Get 10 qualified leads per month	30 days	By number of qualified leads coming in consistently	An improvement of 50% on current leads per month

decide on 3–5 priority actions only

if everything is a priority, nothing is.

This step is about choosing the actions that will have the biggest impact on your goals — not everything you could do.

Ask yourself:

- What actions will directly support my marketing goals?
- What can I realistically commit to with my current time and resources?
- What will make the biggest difference if done consistently?

If an action doesn't clearly support a goal, it doesn't belong here.

Examples of priority actions

- Rebuild or optimise key website pages
- Create a consistent email marketing campaign
- Set up and test a Google Ads campaign
- Improve website conversions
- Establish a regular content schedule

Action:	Action:	Action:

monthly check-in

what's working - and what isn't?

This page is designed to help you pause, reflect, and adjust — without overthinking or overanalysing.

Use it once a month to check in on your progress, notice patterns, and decide what (if anything) needs to change.

What worked:	What didn't:	Adjustments:
New website drove higher quality leads	Meta ad campaign is attracting low quality leads	Revisit Meta Ads strategy and A/B test ad content

Use this space for patterns you're noticing, ideas to explore, or reminders for next month.

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