



YEARLY GOAL-SETTING PLAN

A structured framework for defining goals, breaking them into achievable components, and maintaining accountability throughout the year.

Step 1 — *Set Four Annual Goals (Three Professional and One Personal)*

Why this step matters

Setting a limited number of focused annual goals creates clarity and direction. It prevents overload, sharpens priorities, and ensures balance between professional performance and personal well-being.

Instructions

1. Identify three professional goals that directly support your long-term business or career objectives.
2. Identify one personal goal that supports your health, growth, relationships, or overall quality of life.
3. Write each goal using the SMART framework.

Examples

Professional Goal Examples

- Increase annual revenue by 20 percent.
- Improve lead-to-client conversion rate from 18 percent to 25 percent.
- Implement a new CRM or ATS system company-wide.



Personal Goal Examples

- Exercise at least three times per week.
- Read twelve business or personal development books.
- Dedicate one uninterrupted evening per week to family or personal time.

Step 2 — *Break Annual Goals into Quarterly Milestones*

Why this step matters

Quarterly milestones divide the year into manageable segments, create urgency, and allow for regular review and course correction.

Instructions

Break each annual goal into four quarterly milestones, each representing measurable progress.

Examples

Annual Goal: Increase revenue by 20 percent.

Quarterly Milestones

Q1: Audit revenue streams and achieve 5 percent growth.

Q2: Improve conversion and follow-up systems and achieve an additional 5 percent growth.

Q3: Launch new marketing initiatives or partnerships for another 5 percent increase.

Q4: Optimize year-end strategies to secure the final 5 percent.



Step 3 — *Break Quarterly Goals into Weekly Action Steps*

Why this step matters

Weekly steps convert milestones into manageable tasks and establish consistent execution habits.

Instructions

Define weekly tasks that support the quarterly milestone and review progress weekly.

Examples

Quarterly Goal (Q1): *Achieve 5 percent revenue growth.*

Weekly Breakdown Example

Week 1: Audit lead sources.

Week 2: Research new lead-generation strategies.

Week 3: Select strategies and set timelines.

Week 4: Launch first new method.

Week 5: Launch second method.

Week 6: Train team on messaging.

Week 7: Improve tracking systems.

Week 8: Review early results.

Week 9: Optimize performance.

Week 10: Strengthen best channels.

Week 11: Mid-quarter review.



Weekly Breakdown Example (continued)

Week 12: Scale winning strategies.

Week 13: Quarter review and preparation.

Accountability and Review Cadence

Why this step matters

A structured review cadence ensures alignment, accountability, and continuous improvement.

Daily: Identify the three most important actions.

Weekly: Review tasks and plan the next week.

Monthly: Evaluate progress toward milestones.

Quarterly: Review outcomes and adjust strategy.

Annually: Assess results and set new goals.