

Business Productivity and Goals Assessment Worksheet

1. Year-in-Review

A. What Actually Happened/ Reporting Facts

Pull together real data, not feelings.

Key areas to review:

- Revenue (by product, service, program)
- Expenses (fixed vs. variable)
- Client volume & retention
- Time spent (where your hours really went)
- Marketing efforts and their results
- Capacity (where you were stretched vs. underused)

Tip: If it wasn't tracked, estimate—but note what you need to track better next year and add to goal for next year.

B. What Worked

Ask:

- What produced results with the least friction?
- What felt aligned *and* profitable?
- What did clients respond to fastest?
- What systems saved time or reduced stress?

Rule of thumb:

If something worked and energized you = it's a growth candidate.

If it worked but drained you = it needs systems or boundaries.

C. What Didn't Work (Without Self-Judgment)

Instead of "failure," look for feedback.

Ask:

- Was the issue demand, pricing, timing, clarity, or execution?
- Did I overbuild something before validating it?
- Was I trying to do too much at once?
- Was the return worth the effort?

Important:

Something not working doesn't mean it was a bad idea. Make note of the reason as well as it may have been:

- Too early
- Poorly positioned
- Under-supported
- Misaligned with your capacity

**Areas that didn't work well can be added into a goal for next year. Be specific.

2. Assess Productivity

A. The Productivity Reality Check

Ask these three questions:

1. What activities directly produced revenue or impact?
2. What consumed time but had little return?
3. What could have been delegated, automated, or simplified?

Simple productivity ratio:

High-impact work ÷ total hours worked

**One of your goals for next year should be not "more work" but a higher percentage of high-impact work.

B. Identify Your Bottlenecks

Look for patterns:

- Decision fatigue?
- Administrative overload?
- Too many offerings?
- Poor boundaries around time or pricing?
- Lack of clear processes?

**Fix bottlenecks before adding new goals.

3. Clarify What “Success” Means This Year

Before setting goals, define success in three dimensions:

1. Financial

- Revenue target (realistic, not aspirational fantasy)
- Profit margin goal
- Cash flow stability

2. Operational

- Fewer hours?
- Better systems?
- Clear roles?
- Improved scheduling or workflows?

3. Personal Sustainability

- Energy level
- Stress
- Time off
- Enjoyment of the work

**A goal that grows revenue but destroys sustainability is not a win.

4. Set Achievable Goals (That Actually Get Done)

A. Fewer Goals, Better Execution

Limit yourself to:

- 3 primary goals for the year
- 1–2 supporting goals per primary goal

Examples:

Primary Goal:

Improve client experience and outcomes by strengthening consistency and quality of service delivery across all programs.

Supporting Goals (Behavior & Systems Based)

1. **Standardize the client journey**
 - Create a clear intake → service → follow-up pathway for every client
 - Document expectations, session flow, and aftercare touchpoints

Why it matters: Consistency improves client trust, outcomes, and referrals.
2. **Increase capacity for individualized care**
 - Adjust scheduling or group size to allow more intentional client interaction
 - Build in structured check-ins at key milestones

Why it matters: Clients feel seen and supported, increasing engagement and retention.
3. **Strengthen team alignment around service delivery**
 - Hold quarterly team check-ins focused on service quality (not productivity)
 - Clarify roles during sessions to reduce confusion and stress

Why it matters: A calm, aligned team creates a better client experience.

B. Make Goals Behavior-Based

Instead of only outcome goals, include process goals.

Don't say, "Increase revenue"

Instead say, "Launch one validated offer per quarter and track conversion weekly"

****You control behaviors more than outcomes and outcomes follow behaviors.**

C. Use the 90-Day Focus Method

Annual goals fail when they're not broken down.

For each goal:

- What needs to happen in Q1?

- What will I measure weekly or monthly?
- What does “done” actually look like?

5. Build in Review & Adjustment

Monthly Check-In (30 minutes)

Ask:

- What moved the needle?
- What didn't?
- What do I stop, start, or continue?

Quarterly Reset

- Adjust goals based on real data
- Refocus effort where traction exists
- Cut what's not working *without guilt*

6. One Final Question—Very Important to goal setting

If I ran this business exactly the same way next year, would I be proud or exhausted?

Let that answer guide your priorities for goals.