



THE PERSONAL COACH

VISION GOALS PLANNER

MEASURE &
IMPROVE YOUR
BUSINESS

Your Name:

Company:

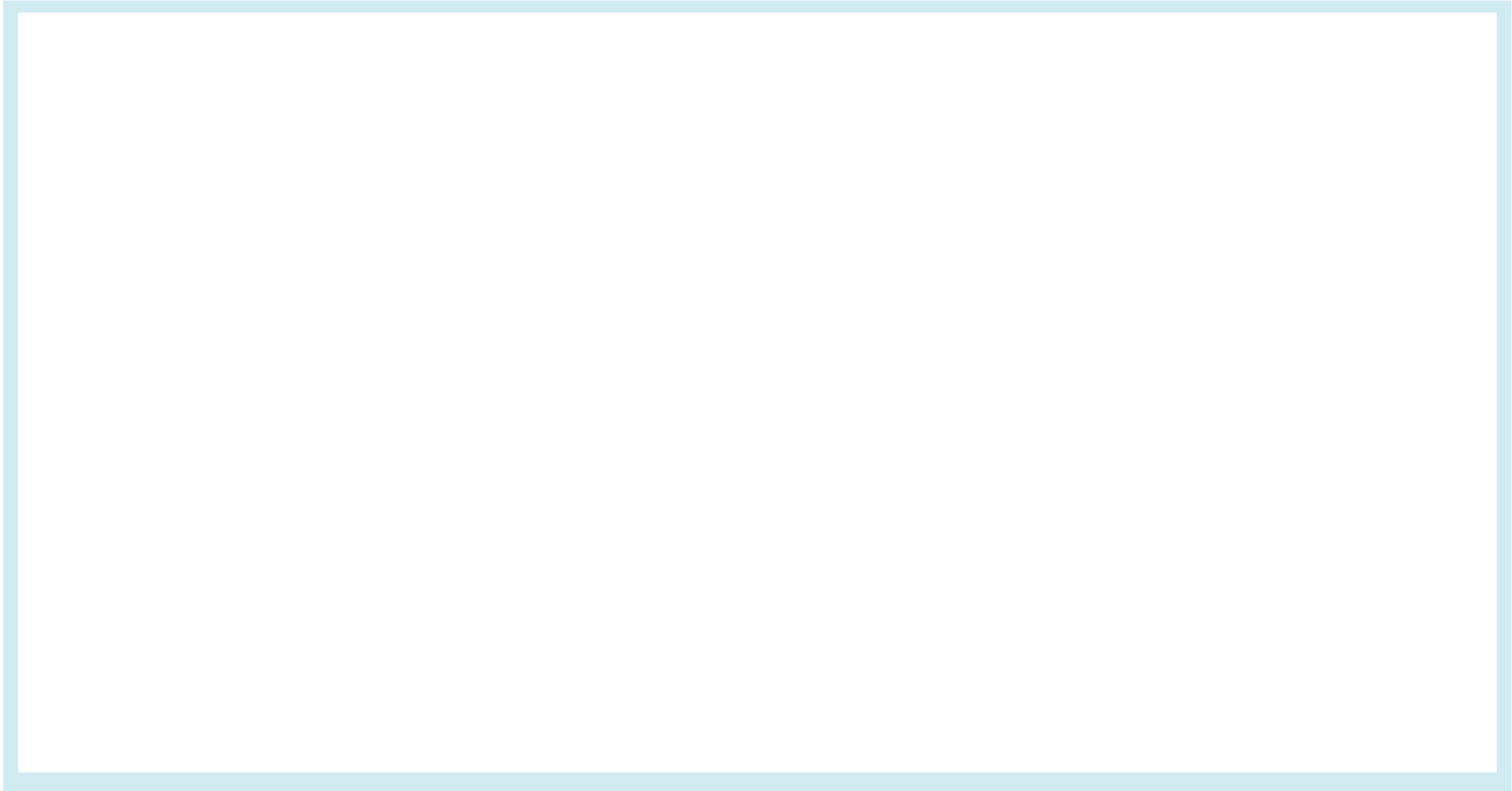
Year:



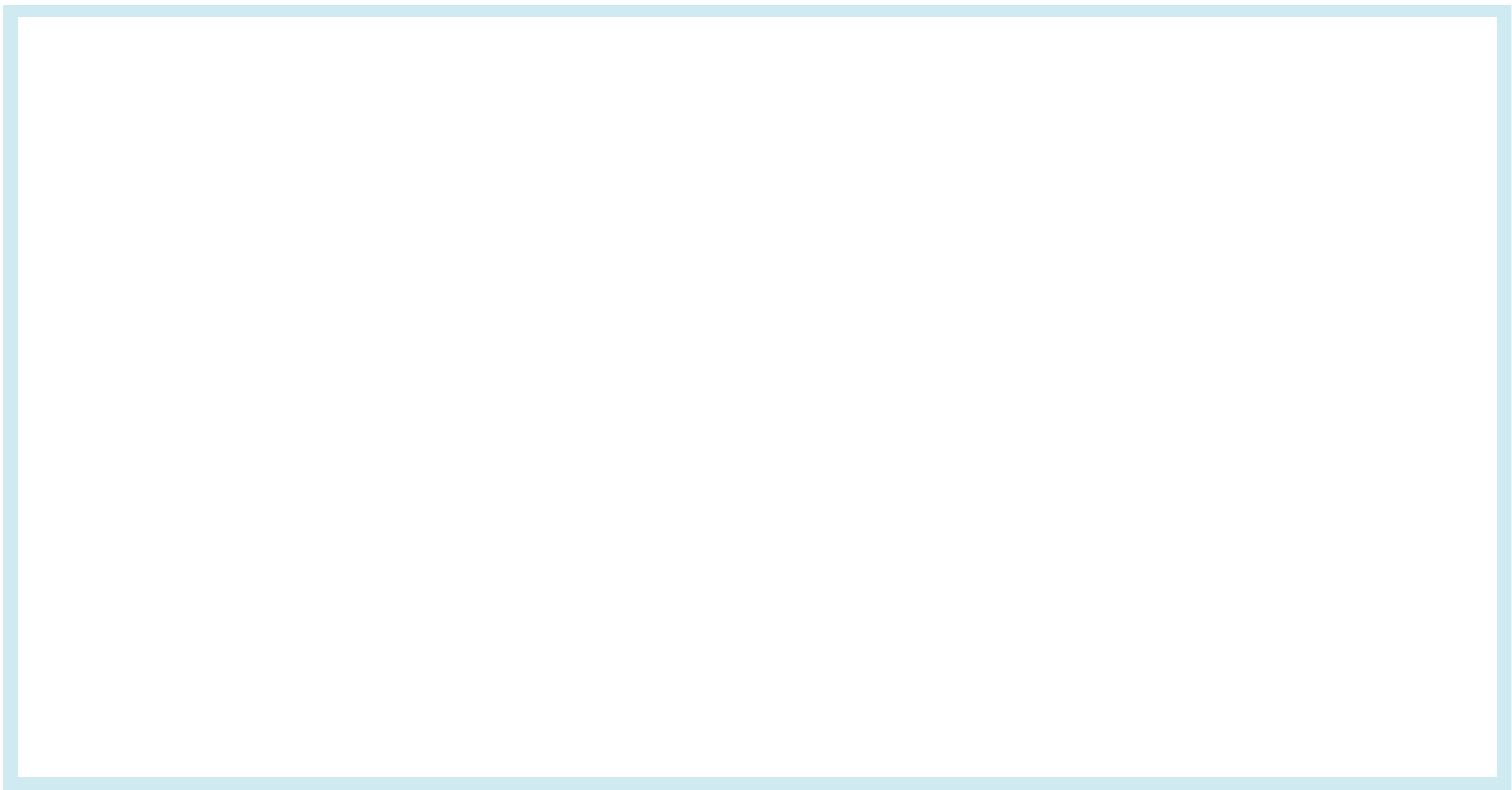
Vision Goals Planner

Step 1: Review Prior Year

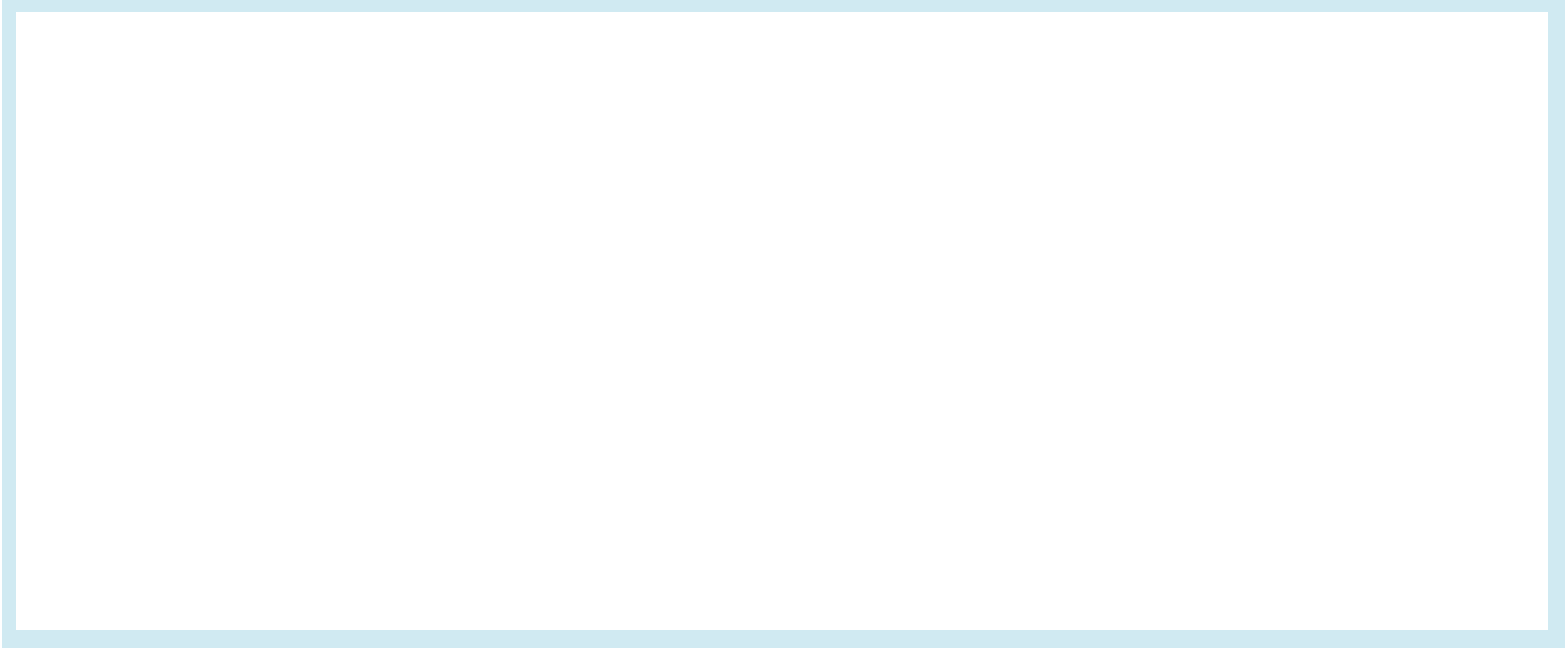
First, let's take a look back and review what worked and what didn't work. What were your accomplishments in the past year?



What were your business weak points? What do you know needs to improve?



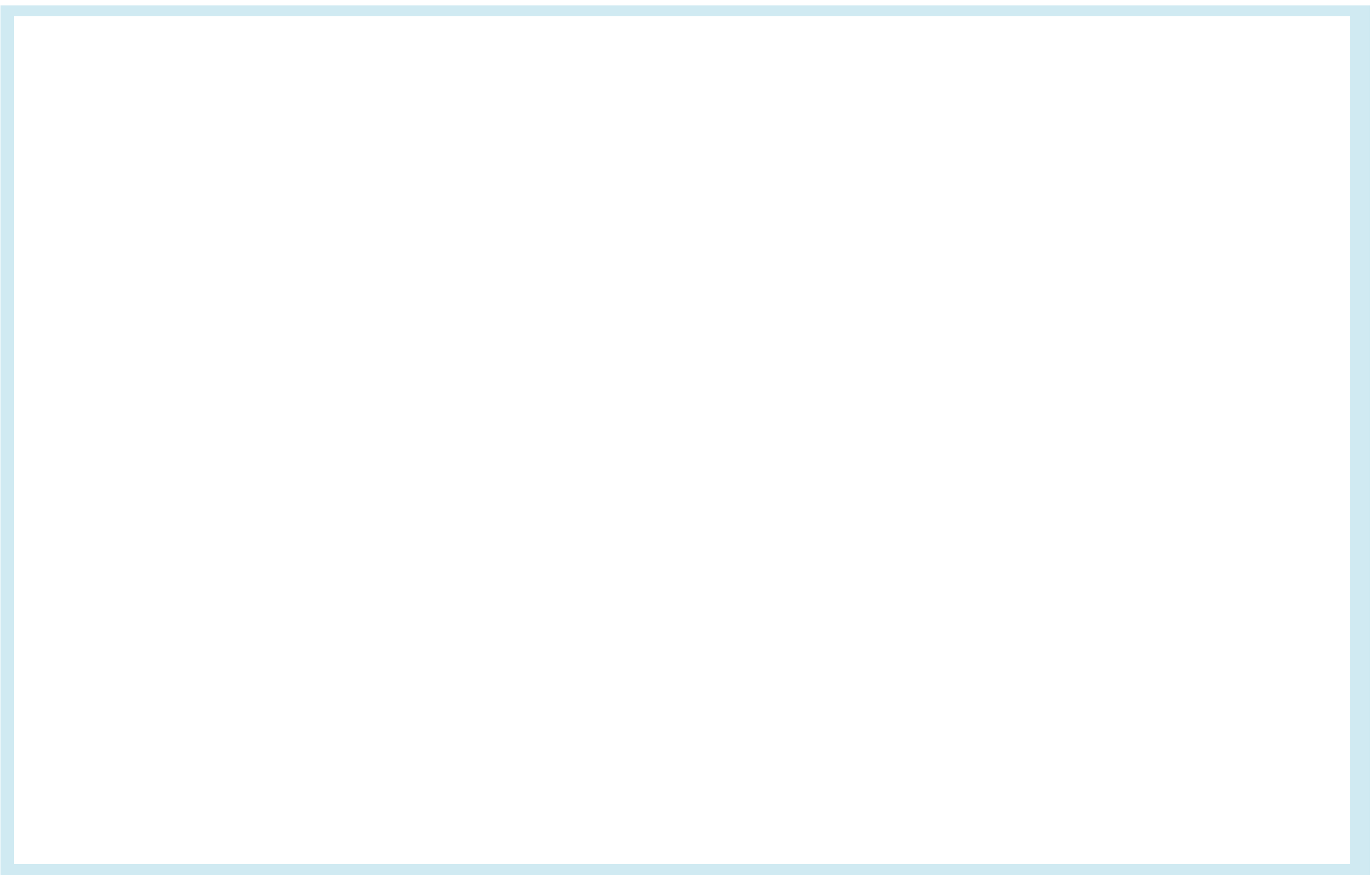
What marketing worked for you last year?



Step 2: Set Vision and Objectives

If we were meeting here 1 to 3 years from today, what has to have happened during that period for you to feel you have achieved your dream life? Think about your clients, how much time you are taking off, your team, your location, your health, your family and your revenue. Include the following if applicable:

- Personal (health, relationships, spiritual, environment, fun, personal growth)
- Business (revenue, clients, office space, time off)



Purpose/Company Vision/Your “Why”

What is the fundamental reason your business exists?

Make it client-centered, externally focused, no goals or strategies

Check out this video:

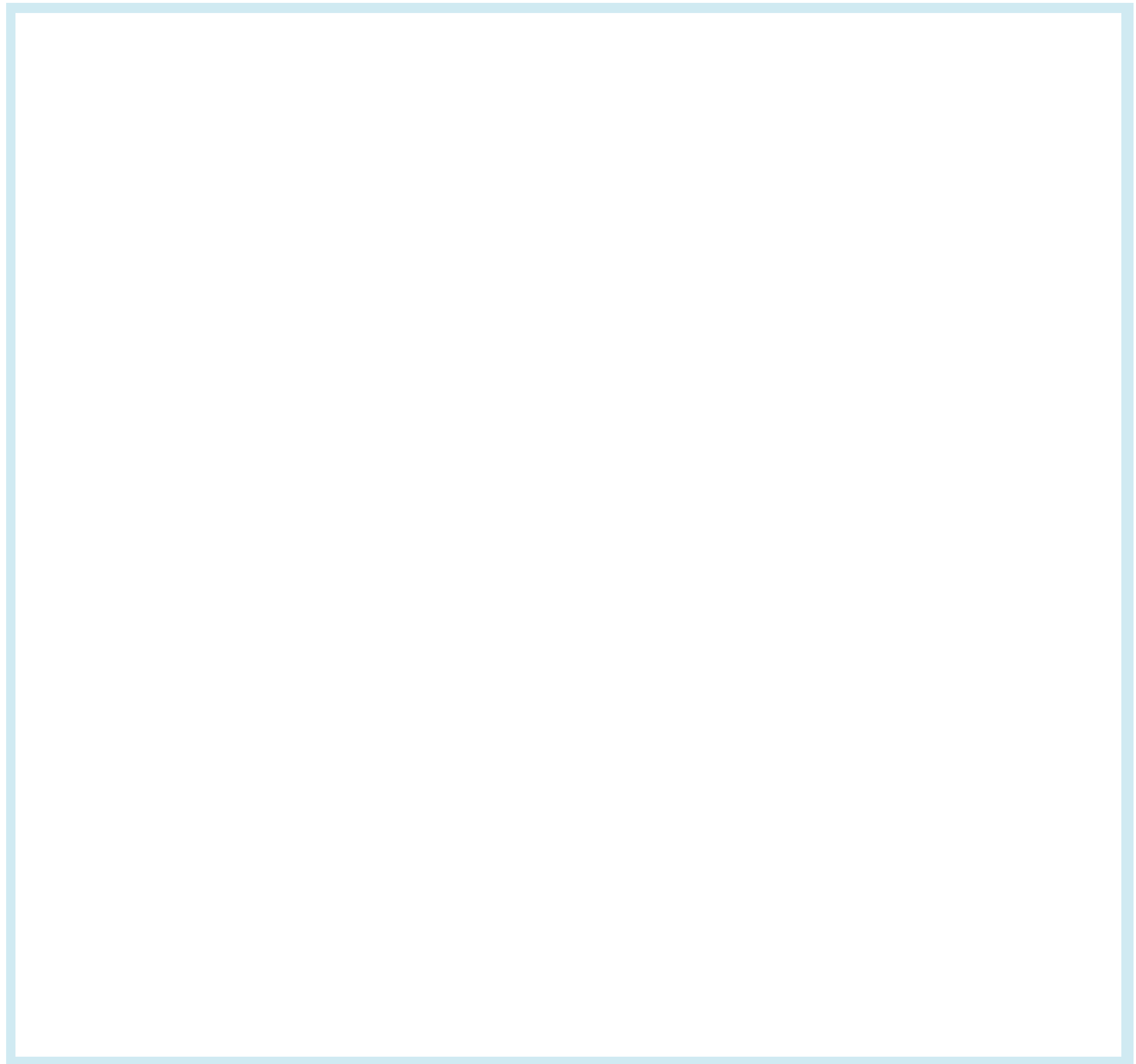
[Start with why -- how great leaders inspire action | Simon Sinek](https://www.youtube.com/watch?v=u4ZojKF_VuA)

If clicking the text doesn't work, here is the link to copy and paste:

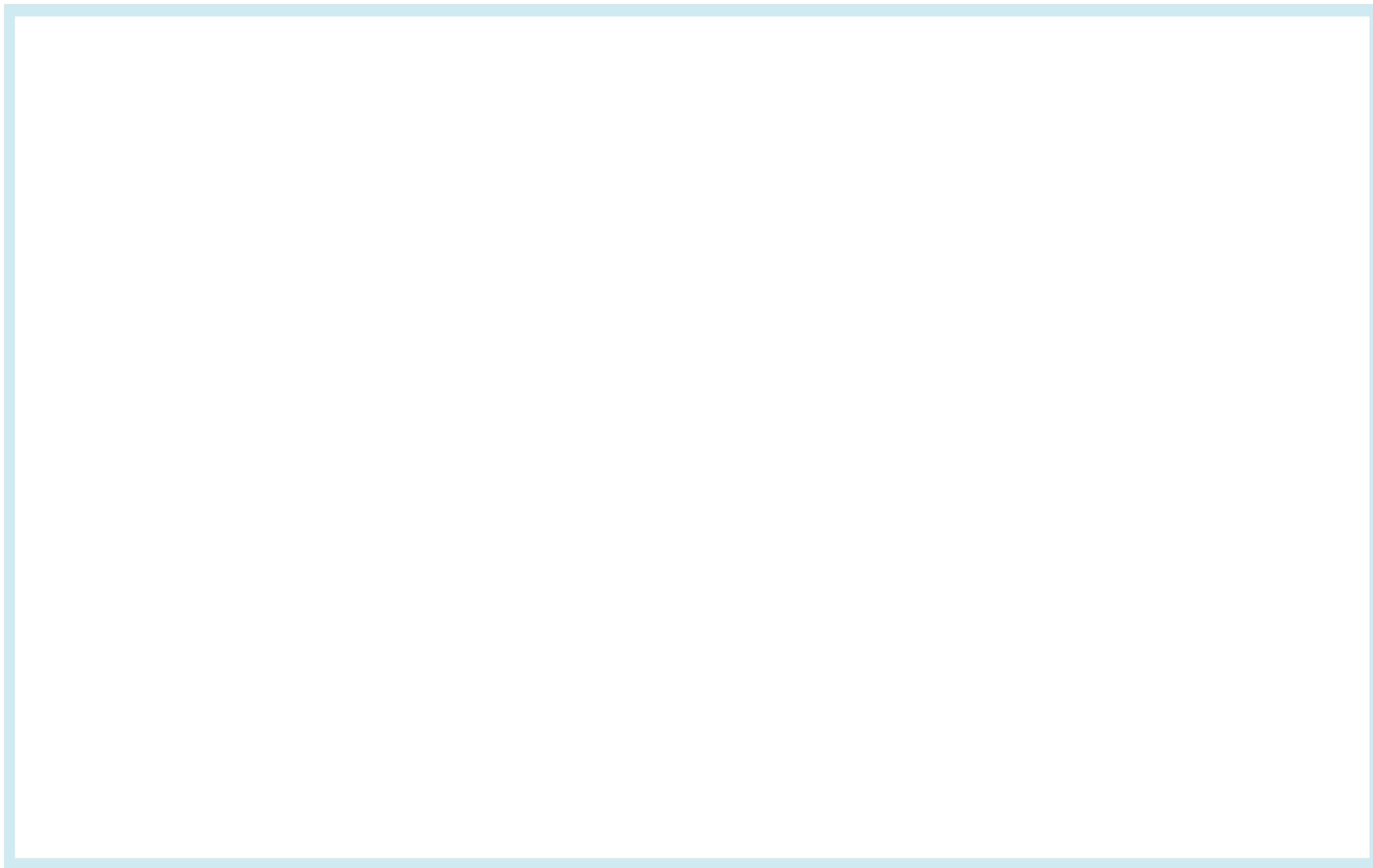
https://www.youtube.com/watch?v=u4ZojKF_VuA

Examples:

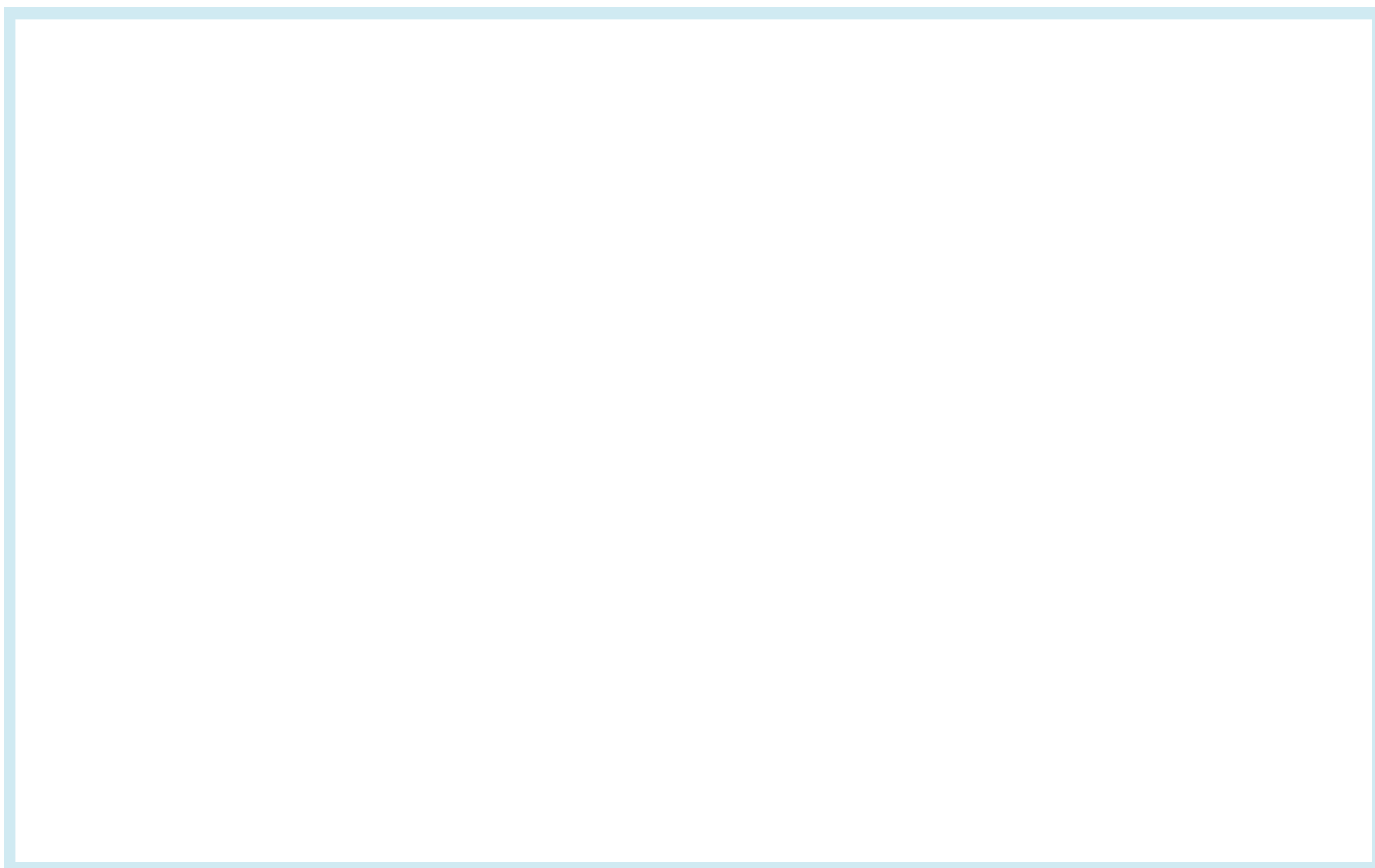
- Our vision is to be the most innovative with our client experience.
- Our vision is to provide an exceptional client experience.
- Our vision is be the top financial advisory firm in our area.



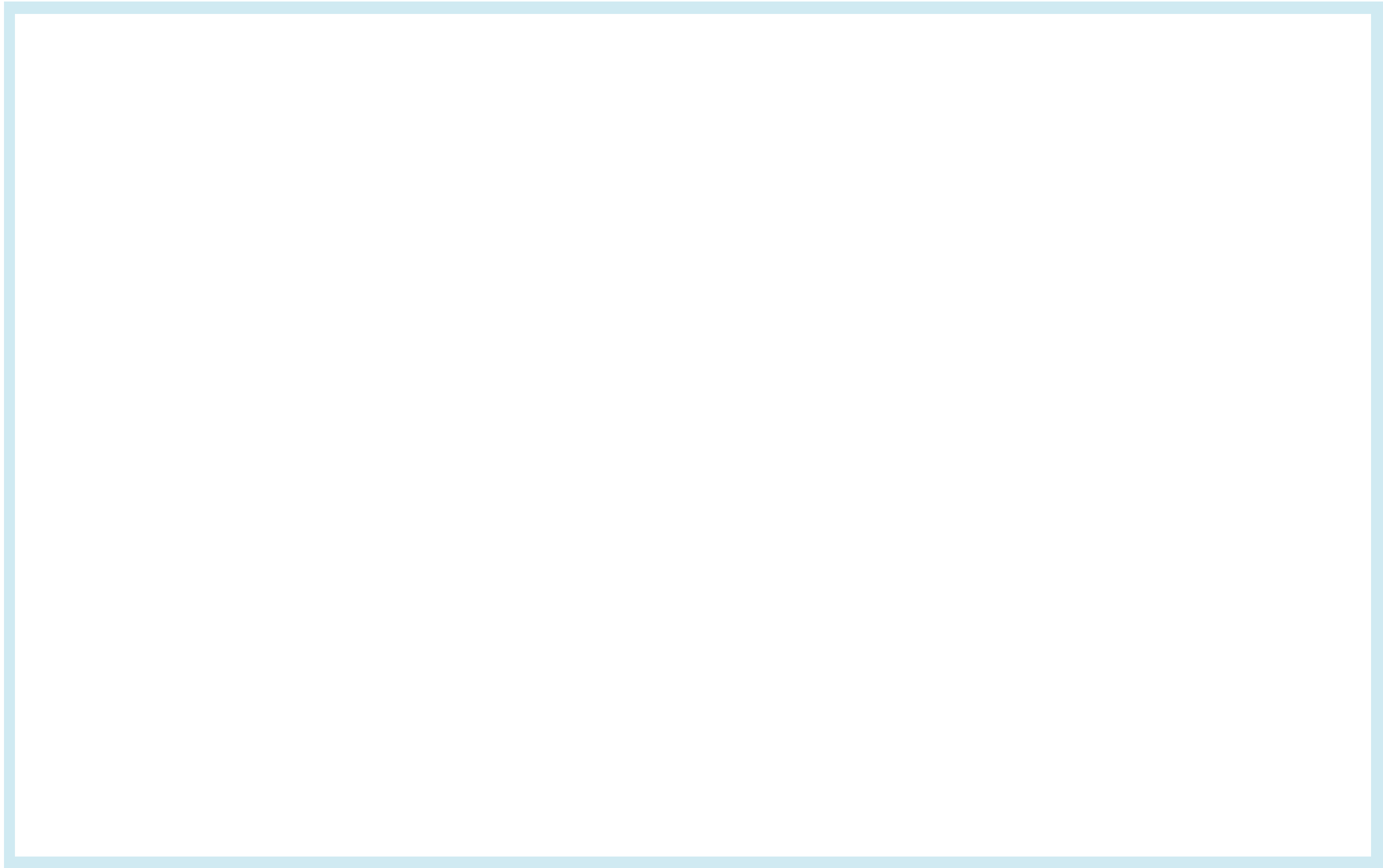
What opportunities currently exist for you (create a numbered list)?



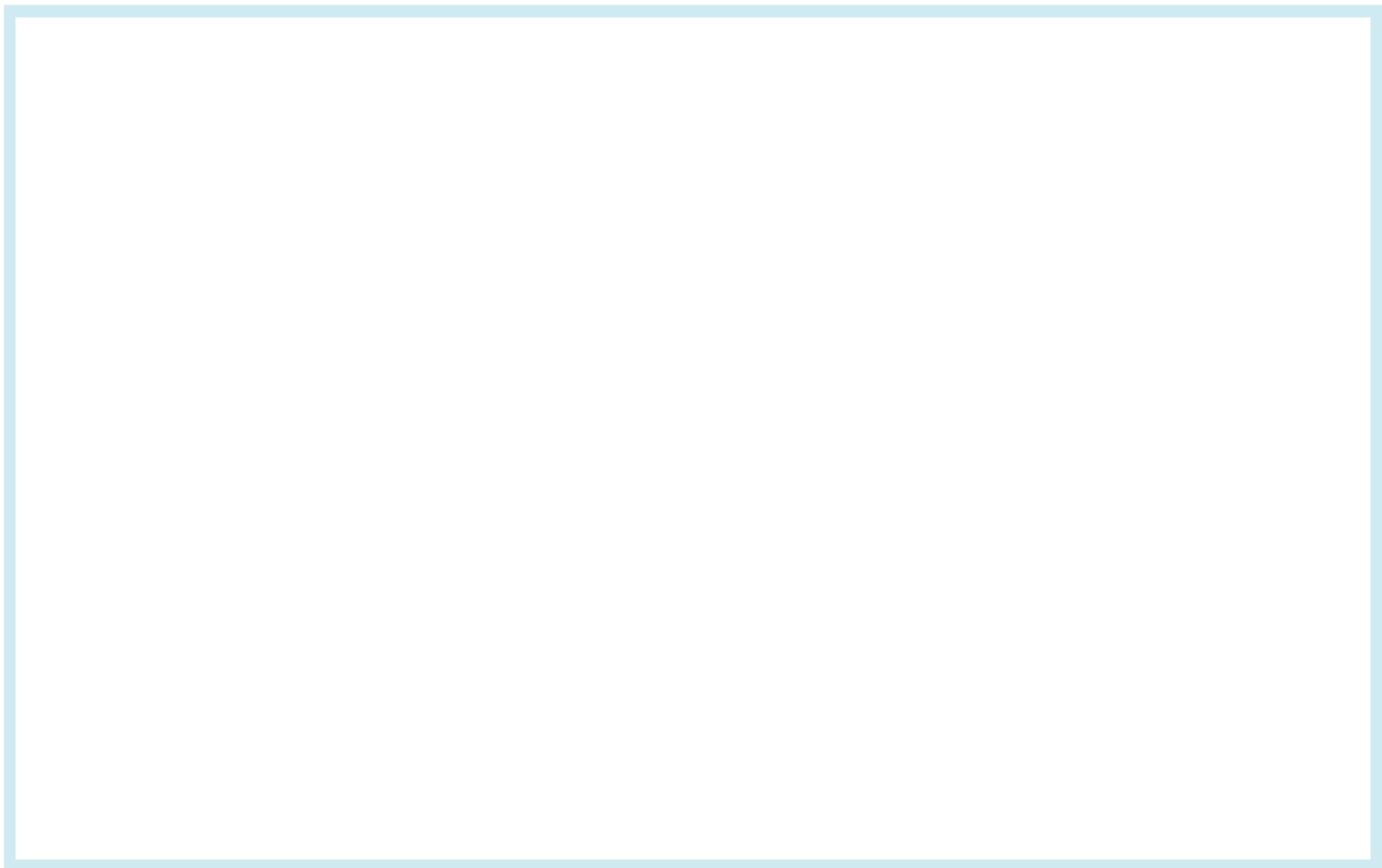
How can you take advantage of these opportunities?



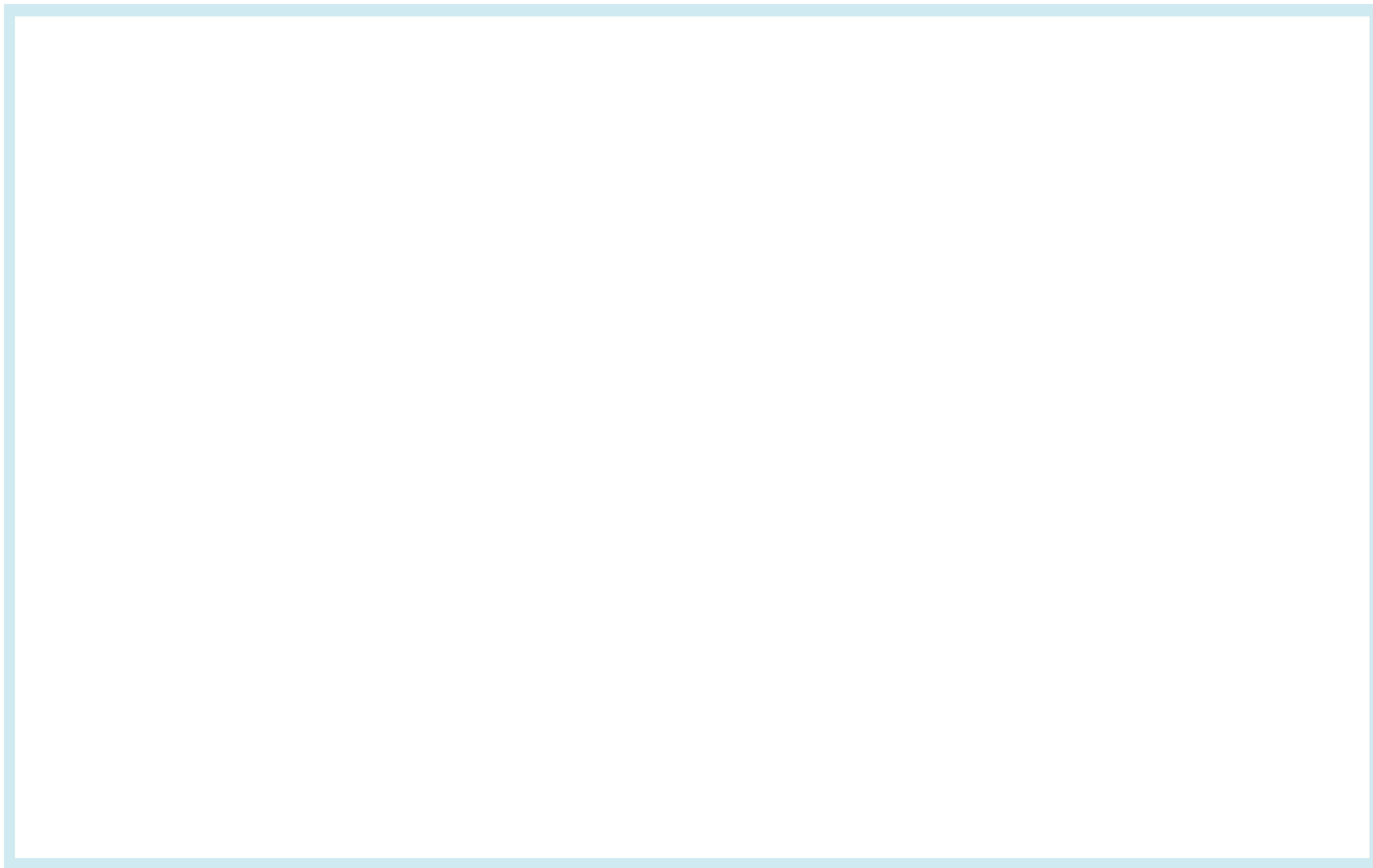
What dangers or threats could stand in the way of your vision (create a numbered list)?



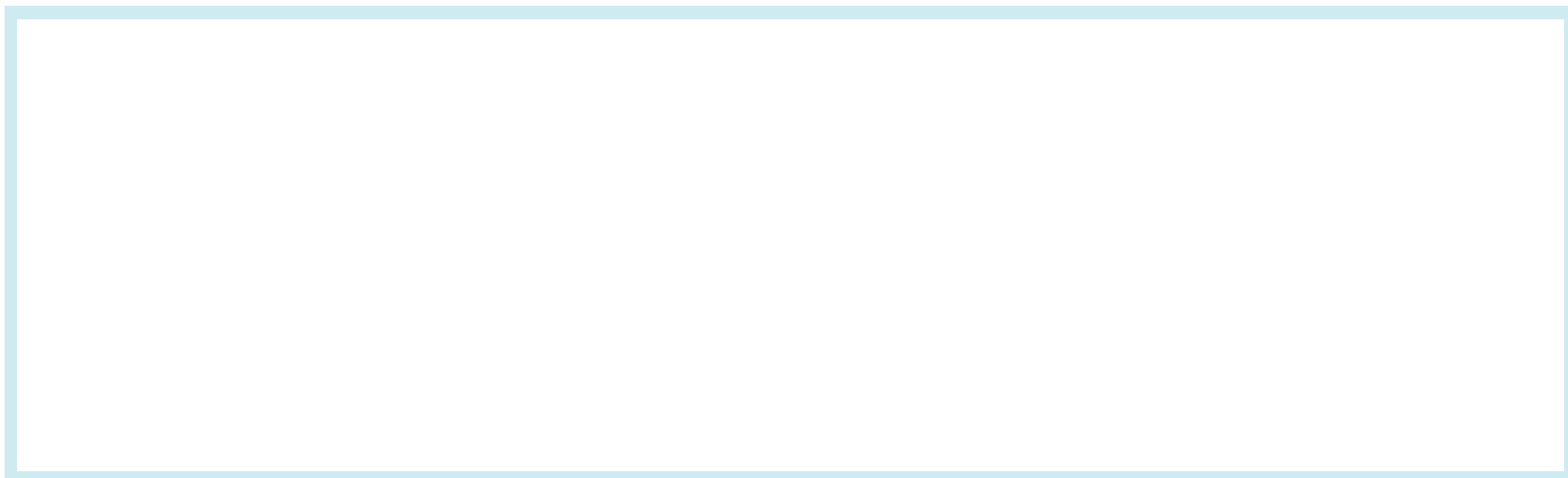
How can you minimize these threats?



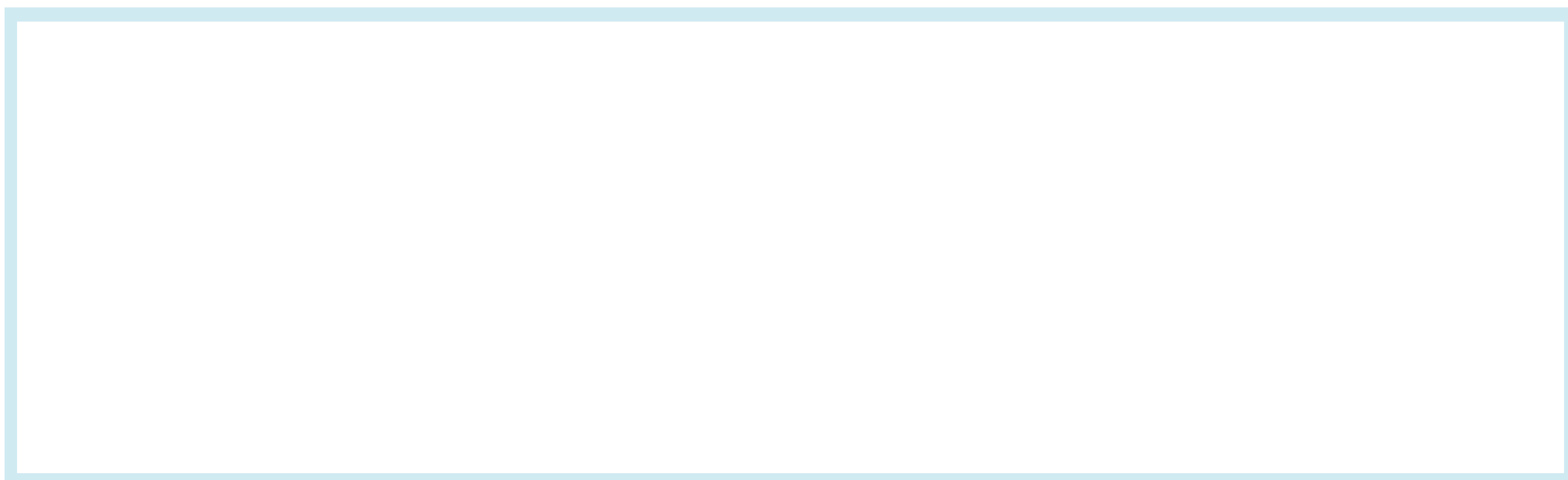
What strategies can I implement to take advantage of these opportunities (create a numbered list)?



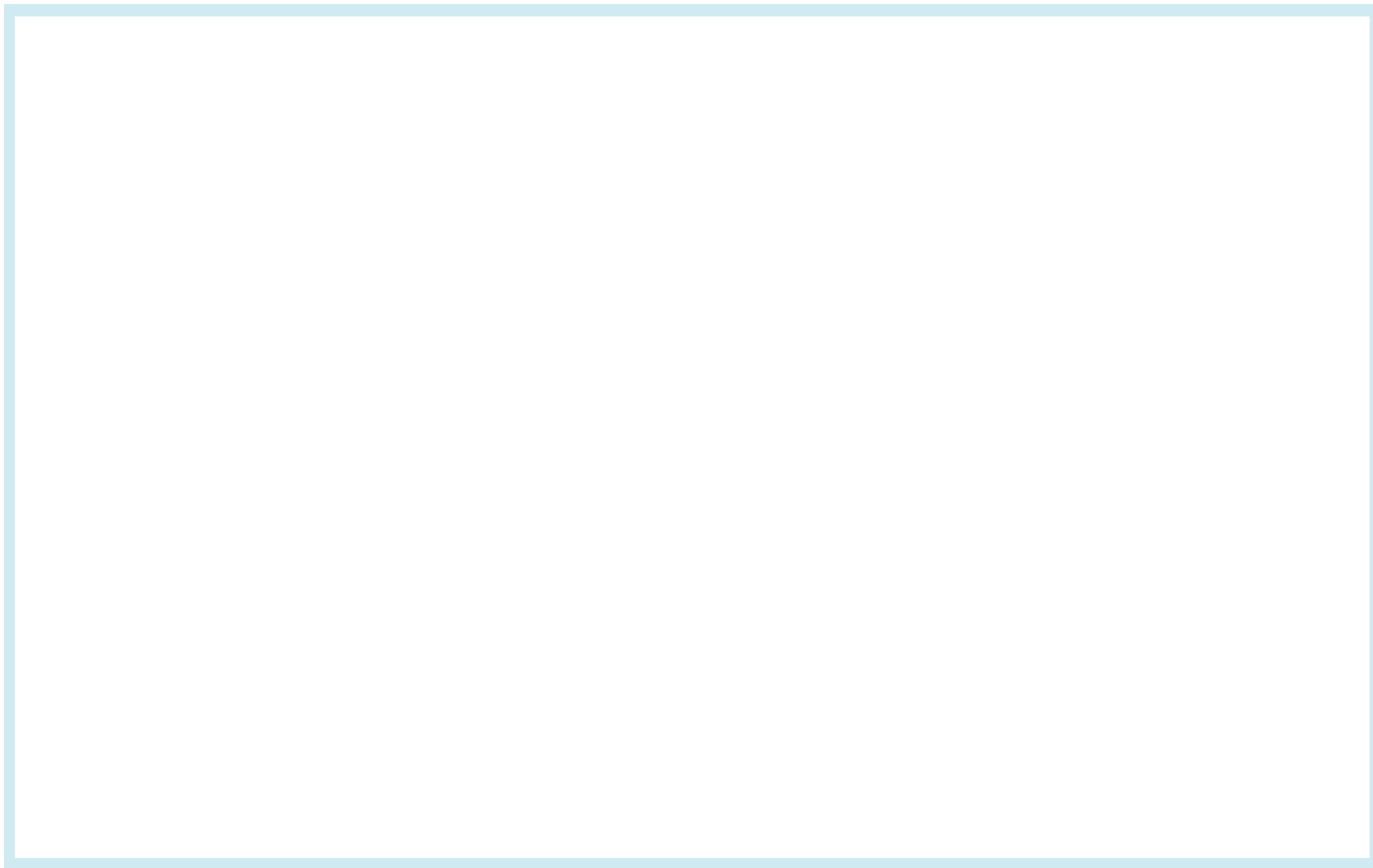
What are my main strengths as an advisor?



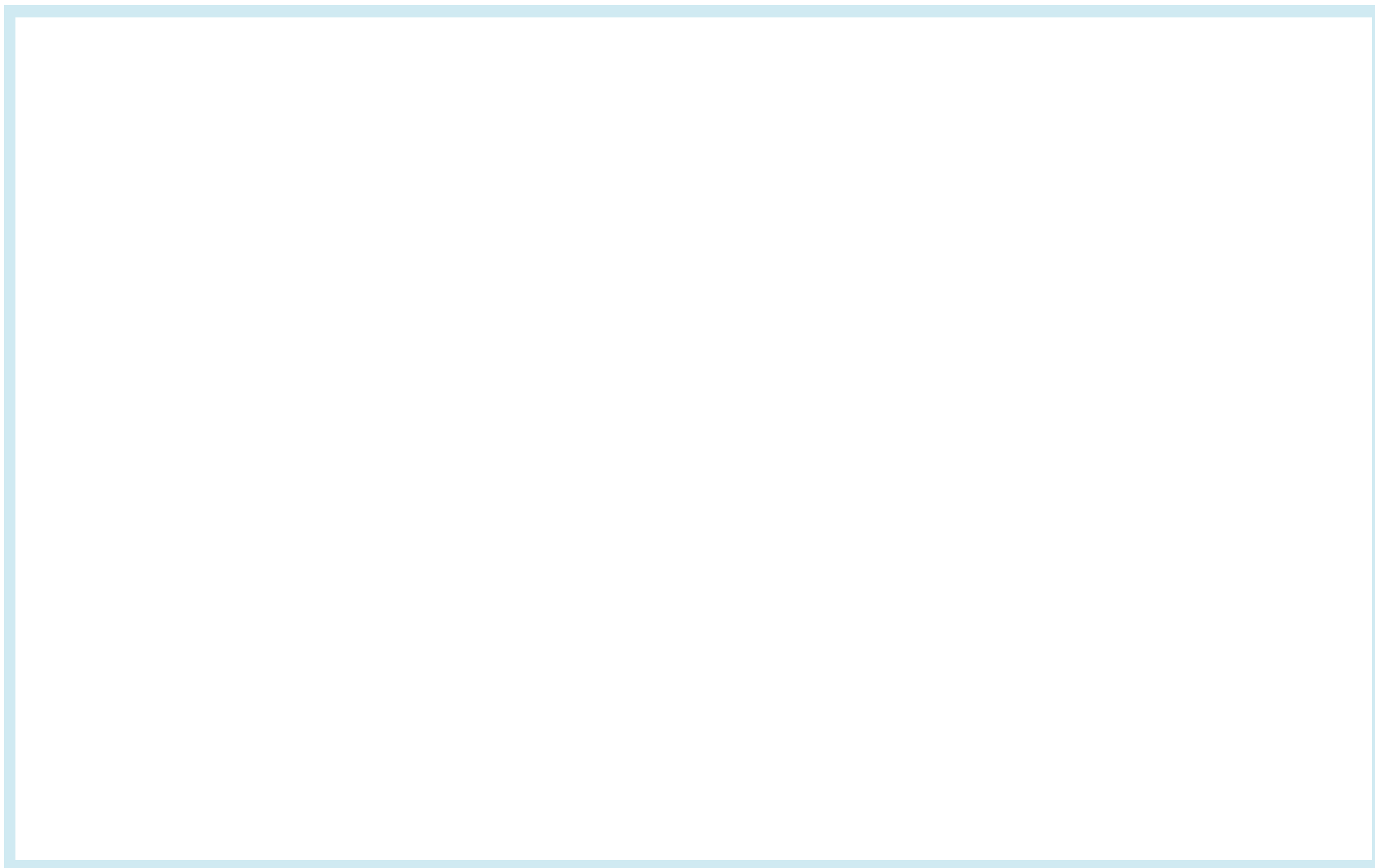
How can I capitalize on my strengths?



What market would I like to specialize in?



What core products and services will I offer?



Goal Setting

It is important to have written, measurable objectives to aim for. A good guideline to check if they are measurable is to see if they are quantifiable – could they be represented on a graph or chart? Remember, the most effective goals are SMART – Specific, Measurable, Achievable, Realistic and Time-Based.

Examples:

- Increase the number of ideal clients from 12 per year to 15 per year.
- Give 6 presentations by the end of the year.
- Meet 3 centres of influence (COI) per month.

Business Goals

Complete the following tables, as applicable, for your business goals for next year and current year results.

	Last Year	This Year
Recurring income (Renewals & Trailers)		
Cross selling to current clients		
New client revenue		
Total		
Investment business		
Insurance Revenue		
Group Business		
Total		
Number of new clients		
Number of life cases/sales		
Appointments per week		
Assets under management		

	Last Year	This Year
Revenue per client		
Client Retention		
Seminars/Client Events/Presentations		
Other Process Goals*		
Vacation Days		

*Other Process Goals can include:

- number of financial plans
- face-to-face contact %
- Client disengagements
- Centres of Influence
- Social media engagement



THE PERSONAL COACH
*Creating Momentum for
Confidence, Focus & Freedom*

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