

Goal Setting Template and Ideas

Setting effective goals helps ensure that you focus on the right things to get the result you need. Writing them down helps keep them front-of-mind. Chapter 8 of Brilliant Selling looks at how to set effective goals. Use this template to establish and write down your own goals. Challenge yourself to ensure that each goal meets the criteria of being 'SMART', within your personal control and motivating.

What should you set goals for?

You need to set goals for the most important aspects of your performance. The ones that will make a real positive difference to the results that you achieve.

Take some time to consider what the most important facets of your role are, what you are already good at and what you need to develop in terms of your skills, behaviours or performance. The following questions should help you define the areas to focus on for your goal setting.

Pick the top 3-5 areas in terms of priority and set goals for each using the templates at the end of this document. Review your progress regularly and set new goals as and when appropriate.

- What aspects of the sales process do I need to focus on to achieve my target (e.g. prospecting, presenting solutions, etc)?
- What sales skills do I need to further develop (eg. using open questions, building rapport, etc)?
- What are the important but not urgent tasks that I need to focus on?
- What can I be doing with existing clients to help ensure they either:
 - Buy from me again
 - Spend more on their orders with me
 - Give me referrals to other prospects
- What are my key strengths in the sales role? What goals can I set so that I utilise these strengths to even greater effect?
- As I consider my sales pipeline, what trends do I notice and what goals can I set to address these trends?

Goal Setting Template

Use the following template to establish your most important sales related goals.

- 1) Write your goal down in the first row.
- 2) Check that the goal is something that you can control yourself. Ideally, these goals should relate to your own performance rather than a result that depends on lots of external factors that you cannot control. If the goal is not in your control take the time to establish a new goal that is within your control. Write this down in the second row.
- 3) Consider the goal against the SMART criteria – really challenge yourself to make sure that your goal meets each of the criteria and change it if necessary to ensure that it does:
 - a. Specific: be as specific as you can on the goal you want to achieve
 - b. Measurable: how will you know when you have achieved it?
 - c. Achievable: is it realistic and in your control?
 - d. Relevant: will this contribute to your desired result?
 - e. Time-Bound: set a specific date for achievement of the goal.
- 4) Consider the positive consequences and what you will have as a result of achieving the goal. Really engage with these vividly so that they become compelling. Write these down.
- 5) Consider what will happen if you do not achieve the goal. Write these consequences down.

Goal 1

Goal	
Is it within my control? If not, how can I change the goal to be something that I can control?	
What will you have as a result of achieving this goal? Consider all of the positive consequences	
What will happen if you do not achieve this goal? Consider all of the downsides/ negative consequences	

Goal 2

Goal	
Is it within my control? If not, how can I change the goal to be something that I can control?	
What will you have as a result of achieving this goal? Consider all of the positive consequences	
What will happen if you do not achieve this goal? Consider all of the downsides/ negative consequences	

Goal 3

Goal	
Is it within my control? If not, how can I change the goal to be something that I can control?	
What will you have as a result of achieving this goal? Consider all of the positive consequences	
What will happen if you do not achieve this goal? Consider all of the downsides/ negative consequences	

Goal 4

Goal	
Is it within my control? If not, how can I change the goal to be something that I can control?	
What will you have as a result of achieving this goal? Consider all of the positive consequences	
What will happen if you do not achieve this goal? Consider all of the downsides/ negative consequences	

Goal 5

Goal	
Is it within my control? If not, how can I change the goal to be something that I can control?	
What will you have as a result of achieving this goal? Consider all of the positive consequences	
What will happen if you do not achieve this goal? Consider all of the downsides/ negative consequences	