

Goal Setting & Budgeting Checklist

Get started on your year early...

Step-By-Step Checklist and Budget Planner



3 Steps to Better Budgets

Step 1: The Big Picture

Start with your big picture. Take a look at your business and your life from that 10,000 foot view.

- What's on your path for the next year, three years, ten years?
- What is the balance you want to have? What freedoms & experiences you want to have?
- How do you define your [work life balance](#)?

Step 2: SMART Goals

Once you've worked on your big vision... ironed out your WHY, it's time to get to work.

- Create your [SMART goals](#) - Specific, Measurable, Attainable, Realistic, Timely.

Step 3: SMART Goals With Dollar Signs

Daydreaming only gets you but so far. You've got to take it to the next level and give your goals a monetary job to do.

- Create your REVENUE BUDGET - Part 1: Breakdown your sales goals into actions - for instance, how many sales do you plan to make per month or per quarter?
- Create your REVENUE BUDGET - Part 2: Attach a dollar amount to action goals - for instance 100 ebook sales x \$10 = \$1,000
- Create your EXPENSE BUDGET - put in line items for things like marketing, merchant services fees, software expenses, etc
- Put the them together for your Full Budget

Surprise!

You've gone through the steps but now
you want to play around with the
numbers a bit?

I think I can help a little with that...

Grab All Of My Templates... Including My
Budget Spreadsheet Template

