

BEYOND WEALTH

SMART Goals & 90-Day Roadmap Workbook

For business owners and entrepreneurs: turn a big sales goal into a clear target, the numbers it takes, and a 12-week plan you can follow every day.

beyondyourwealth.com/goals

How to use this workbook

15 minutes to fill in, then 10 minutes every Friday.

1 Write your vision

Picture the business a year from now so every goal points the same way.

2 Make one goal SMART

Specific, measurable, achievable, relevant and time-bound. One main goal beats five.

3 Run the sales math

Work backward from revenue to customers, leads and daily outreach.

4 Plan 12 weeks

One milestone and three action steps per week.

5 Protect two blocks a day

A money block for leads and sales and a build block for systems.

6 Score every Friday

Track the numbers and adjust next week.

Your 12-month vision

Where will the business be one year from today?

Monthly revenue and profit in 12 months:

What a great workday looks like (hours, team, clients):

The one thing that would change everything if it happened this year:

Why this matters to you and your family:

Your SMART goal

Specific · Measurable · Achievable · Relevant · Time-bound

S Specific: exactly what will you achieve?

M Measurable: what number will you track?

A Achievable: what resources and steps make it realistic?

R Relevant: why does this goal matter now?

T Time-bound: what is the deadline?

MY SMART GOAL STATEMENT

By [date], I will [goal], reaching [number] (from [today]) by [how], because [why].

The sales math

Work backward from the money to the daily actions.

Monthly revenue goal (\$)

The number from your SMART goal

Average sale (\$)

Total revenue last 3 months ÷ number of sales

Customers needed per month

Revenue goal ÷ average sale

Close rate (%)

Sales ÷ quotes or consultations

Leads needed per month

Customers needed ÷ close rate

Leads needed per week

Leads per month ÷ 4.3

Leads needed per workday

Leads per month ÷ 21.7

People to reach per day

Leads per day ÷ your reach-to-lead rate

Tip: raising your average sale or close rate cuts the leads you need. A 10% price increase with the same close rate means about 9% fewer customers for the same revenue.

Your 12-week roadmap (weeks 1-6)

One milestone and three action steps per week. Tick them off.

WEEK 1 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 2 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 3 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 4 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 5 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 6 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

Your 12-week roadmap (weeks 7-12)

One milestone and three action steps per week. Tick them off.

WEEK 7 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 8 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 9 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 10 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 11 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

WEEK 12 · Milestone: _____ Target: _____

- ☐ _____
- ☐ _____
- ☐ _____

Your ideal day

Two protected focus blocks a day move the goal. Fill in your times.

TIME	BLOCK
__:__	Morning routine: water, move, read your goal
__:__	Plan the day: your 3 must-dos
__:__	MONEY BLOCK: leads, sales calls, follow-ups
__:__	Lunch and a walk
__:__	BUILD BLOCK: systems, content, delivery
__:__	Admin: invoices, messages, CRM
__:__	Review today, set tomorrow's first move

Free planner online: beyondyourwealth.com/goals builds this schedule for you and adds it to your phone calendar with a reminder before every block.

Weekly scorecard

Fill it in every Friday. What gets measured gets better.

Week	Leads	Quotes	Sales	Revenue \$	Reviews	Steps done
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Want help hitting it?

Beyond Wealth builds the systems that hit goals like this: lead systems, websites, ads, follow-up and AI agents that work 24/7. Book a free 30-minute growth plan and we will look at your numbers together, whether you hire us or not.

Book free: 801-372-7928 · beyondyourwealth.com