



Your Essential Checklist: Planning for the next year



Getting into the right frame of mind to setting goals for 2018

Setting goals and planning are a science in themselves. This checklist provides an easy and quick way to get anyone on your team, including yourself, into the right frame of mind to do what is necessary to set meaningful goals for the next year.

When going through the list on your own make sure you have a quiet moment to thoughtfully reflect on the various questions.

A look back



What happened in 2017?

List overall key elements and write down for each what worked, what didn't work, what was learned, and if it worked can it be duplicated next time. If it didn't work, how it can be avoided in future.

What happened?	What worked?	What didn't work?	What have we learned?	What can we duplicate/avoid next time?

Which key trends have you identified that need to be worked into next years plan?
What are your clear opportunities to grow?

Reviewing goals



2017 goals

Take a moment to review your goals from 2017 - they will help when setting new goals

Goal	Target	Actual	% Achieved	Comment about result

Going forward



2018 goals

Key growth goal: _____

SMART meter: is it Specific, Measurable, Attainable, Relevant, Timely?

List 3-5 main goals:

Goal	Specific?	Measurable?	Attainable?	Relevant?	Timely?
Example: 100 website leads coming in per month by September 2017	<input checked="" type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

Key Performance Indicators



A look at KPIs for sales and marketing departments

What is the key growth goal going to be?
More awareness? Engagement? Leads? Revenue? Customers?

Which KPIs are going to show you if you are on track with your key growth goal?

Choose 3-5 major KPIs to track:

1

2

3

4

5

Ask yourself the following questions:

How is my data being tracked? Where is it coming from? How is it reported?
By whom and in what way?

Resources for more information

www.hbr.org
www.entrepreneur.com

About us

Get a step ahead of your competition
before 2018

Setting goals is just the beginning...

Imagine if you could take control of your lead generation activity, then nurture and convert your prospects before your competitors even get close.

By being your efficient central hub for website visitor intelligence, lead generation and marketing insight, Lead Forensics will give you all the data you need to convert high quality leads faster.

Uncover who your anonymous website visitors are, identify when they're ready to buy and access the contact details you need.

Optimise your online and lead generation goals for 2018 with a free demo and trial today:

[**GET STARTED**](#)

Free trial: **0207 206 7293**

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