

Envision Your Business Success Worksheet

Are you struggling to make a marketing plan for your business? This worksheet will guide you through how to envision your goals, plan your strategy, and measure the success of your plan. I've used this methodology to scale my business and helped many of my clients do the same.

If you need support contact me design@katienehls.com

Step 1: Envision your business success

Instructions:

- Sit-down in a quiet place
- Take out a pen and paper
- **Answer the following questions:**
 - What does success look like for your business in 2025?
 - How are you spending your time day-to-day?
 - What kind of clients or customers are you serving?
 - How much revenue are you generating?
 - What impact are you creating in your community or industry?

Use this space for the answers or drawings. However you see it!

Step 2: Choose 3 goals inspired by the previous step and write 5 tasks you can do to achieve this. Trust yourself.

Write tasks that are **realistic** and **aligned with your resources**. If you need inspiration, check out the [idea list at the end of this document](#).

Example:

Goal 1: Grow my business by \$20,000 in revenue

- Task 1: Launch a season marketing campaign
- Task 2: Offer a Loyalty or Referral Program
- Task 3: Revisit my services, create a new offering
- Task 4: Attend one networking event a month
- Task 5: Hire a web designer to refresh my website

My Goals and Tasks:

Goal 1: _____

- Task 1: _____
- Task 2: _____
- Task 3: _____
- Task 4: _____
- Task 5: _____

Goal 2: _____

- Task 1: _____
- Task 2: _____
- Task 3: _____
- Task 4: _____
- Task 5: _____

Goal 3: _____

- Task 1: _____
- Task 2: _____
- Task 3: _____
- Task 4: _____
- Task 5: _____

Step 3: How will I measure the success of this goal for my business?

You need to be very specific and clear about what this means. Try not to have more than 3 ways to measure the success of your habits/tasks.

Examples:

- Gain X new followers on instagram
- Increase revenue by XX% or \$\$
- Be able to hire a one full-time employee
- Not work on weekends consistently

... it can be anything you want. This is your vision!

How I'll Measure My Success:

Goal 1: _____

- Metric 1: _____
- Metric 2: _____
- Metric 3: _____

Goal 2: _____

- Metric 1: _____
- Metric 2: _____
- Metric 3: _____

Goal 3: _____

- Metric 1: _____
- Metric 2: _____
- Metric 3: _____

Step 4: Plan with Intention

Break your goals into quarterly focus areas to stay on track throughout the next year.

Quarterly Focus Areas:

- Q1 (Jan–Mar): _____
 - Q2 (Apr–Jun): _____
 - Q3 (Jul–Sep): _____
 - Q4 (Oct–Dec): _____
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Congratulations on taking the time to envision and plan for your business success in 2025! Remember, consistency and reflection are key. Revisit this worksheet regularly to track your progress and make adjustments.

Need help or accountability? Reach out—I'd love to support you on your journey.

Design@katienehls.com

[Katienehls.com](https://katienehls.com)

Or you can autoschedule an intro call here:

<https://usemotion.com/meet/katie-nehls/discovery-call>

Actionable Task Ideas for Achieving Business Goals

Marketing & Visibility

- Post consistently on social media (e.g., 3x per week).
- Write and send a monthly email newsletter.
- Start a blog and publish articles twice a month.
- Create and launch a seasonal marketing campaign.
- Run a paid ad campaign on Facebook, Instagram, or Google.
- Partner with another business for a cross-promotion.
- Record and post weekly video content (e.g., Instagram Reels or TikToks).
- Host a free webinar or workshop to attract leads.

Client & Customer Engagement

- Respond to customer inquiries within 24 hours.
- Send personalized thank-you notes or emails to new clients.
- Offer a limited-time promotion or discount for existing customers.
- Create a loyalty or referral program.
- Conduct customer surveys to gather feedback and improve services.

Business Development

- Attend one networking event per month.
- Join a professional association or leads group.
- Identify and pitch to 10 potential clients or partners.
- Develop a new service or product offering.
- Build or update your portfolio or case studies.

Website & Online Presence

- Hire a web designer to create or refresh your website.
- Optimize your website for SEO by researching and adding keywords.
- Add testimonials or client success stories to your site.
- Set up analytics tools (e.g., Google Analytics) to track website traffic.
- Create a lead magnet (e.g., a downloadable guide or checklist) and add it to your website.

Skill Building & Education

- Take an online course to improve your marketing or business skills.
- Read one book per month on business, marketing, or mindset.
- Schedule regular time for brainstorming and strategy planning.
- Listen to a business podcast weekly for inspiration and ideas.

Team Building & Outsourcing

- Hire an assistant to help with administrative tasks.
- Work with a social media manager to streamline your content.
- Bring on a bookkeeper or accountant to manage your finances.
- Delegate a time-consuming task to a freelancer.

Personal & Professional Well-being

- Block off one day a week to rest or focus on creative projects.
 - Take a vacation or extended break without checking emails.
 - Set boundaries around work hours (e.g., no work on weekends).
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