



The Importance of Goal Setting Workshop

Elinor Perry

You want your business to perform to its full potential and you'll find the team at Pentlands are also passionate about your business performance.

“ Passion? Dedication?
Enthusiasm? Performance?”

These aren't words you immediately associate with accountancy! But they're words we feel strongly apply to the way we do business. Naturally you can expect us to be passionate about your accounts, audit and saving you some tax too. But you can expect much more from Pentlands...

... you can expect Pentlands to be genuinely supportive, curious about your company's ethos and ambitions, and passionate about your business performance. Please look at what our existing clients say about us, we have testimonials and case studies on our website, and you'll get a feel for the way we work and the results we can help you to achieve in your business.

Elinor Perry, Pentlands Accountants, Business and Tax Advisors



The Importance of Goal Setting Workshop

Elinor Perry

Name

Date



Passionate
about your business performance

t 01926 424455 f 01926 424042
www.pentlands.ltd.uk

Personal Goals

What's important to you?

1.

2.

3.

4.

5.

6.



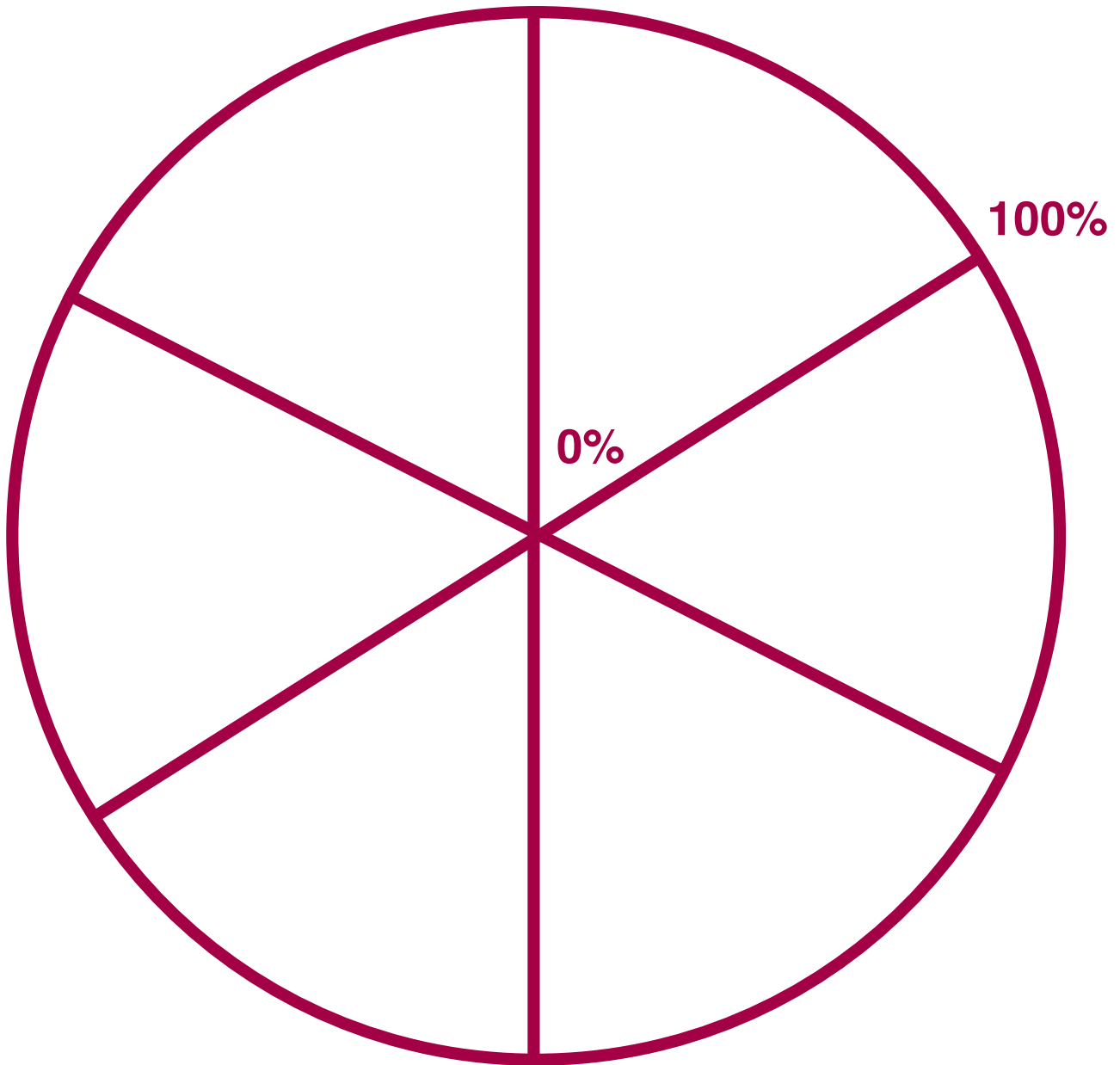
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Notes



Personal Goals Wheel



SMART Goals

➤ **Specific**

What do you want to achieve – more profit?

➤ **Measurable**

You need to be able to track progress <net profit %

➤ **Achievable**

A stretch but not to the extreme!

➤ **Relevant**

A challenge but realistic – you need to believe

➤ **Time-bound**

VERY important to have a date!



Please Choose a Segment

Possibilities

Goal 1

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Goal 1



1.

2.

3.



Have, Do, Be Goals



Please Choose a Segment

Possibilities

Goal 2

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Goal 2



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Please Choose a Segment

Possibilities

Goal 3

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Goal 3



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Please Choose a Segment

Possibilities

Goal 4

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Goal 4



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Please Choose a Segment

Possibilities

Goal 5

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Goal 5



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Please Choose a Segment

Possibilities

Goal 6

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Goal 6



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Business Goals

What's important to you?

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3.

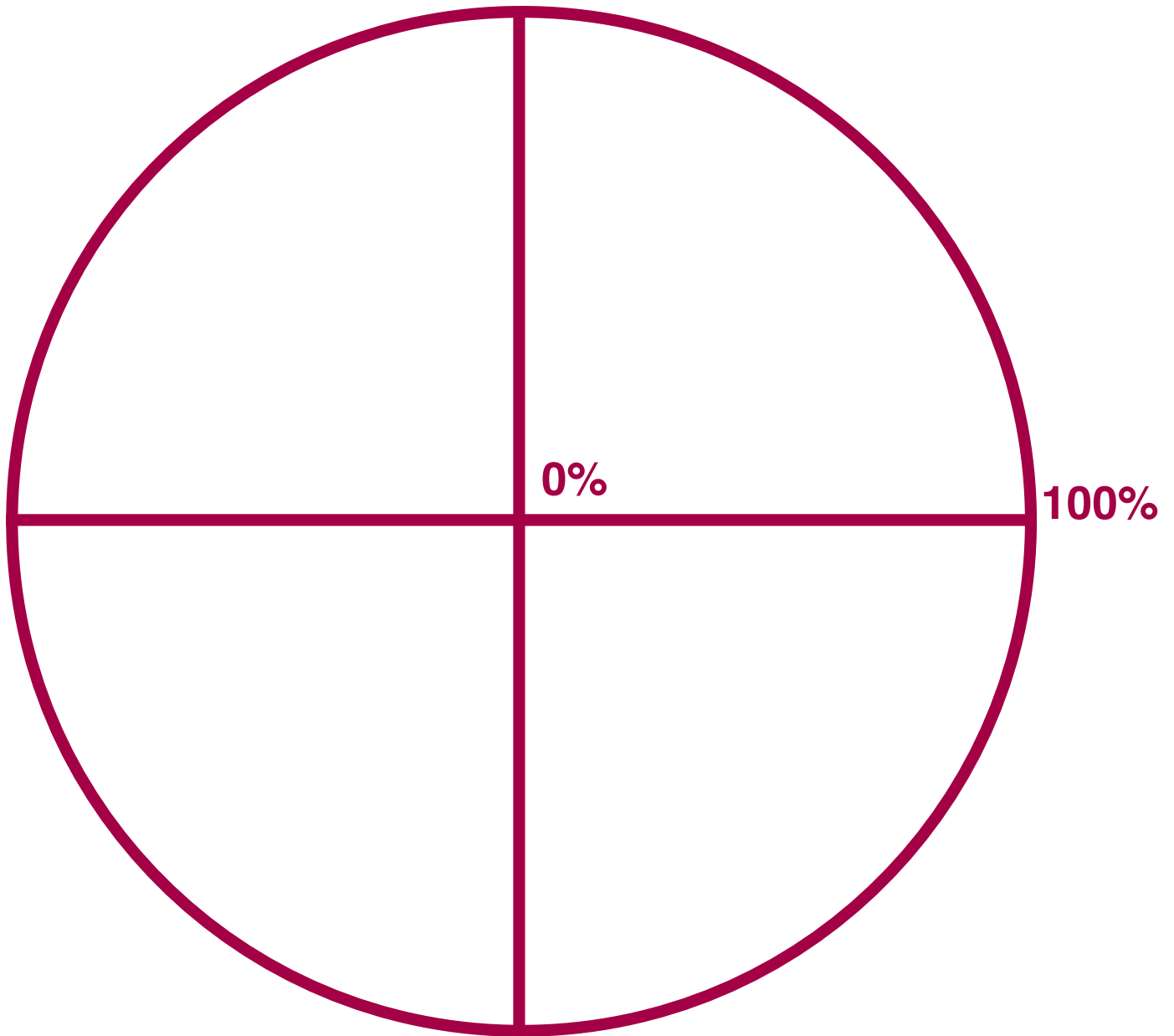
4.



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Business Goals Wheel



SMART Goals

➤ **Specific**

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Please Choose a Segment

Possibilities

Goal 1

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Goal 1



1.

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Two Types of Why



Please Choose a Segment

Possibilities

Goal 2

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Goal 2



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Please Choose a Segment

Possibilities

Goal 3

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Goal 3



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Please Choose a Segment

Possibilities

Goal 4

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Goal 4



1.

2.

3.

Notes



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Stephen R. Covey

The 7 Habits

1. Be Proactive

I am free to choose and I am responsible for my choices.

Notes

The 7 Habits

2. Begin with the End in Mind

Mental creation precedes physical creation.

Notes

The 7 Habits

3. Put First Things First

Effectiveness requires you to act on your priorities.

Notes

The 7 Habits

4. Think Win Win

Long term relationships require mutual respect and mutual benefit.

Notes

The 7 Habits

5. Seek First to Understand and then be Understood

To communicate effectively we must first understand each other.

Notes



The 7 Habits

6. Synergize

The Whole is greater than the sum of it's parts.

Notes

The 7 Habits

7. Sharpen the Saw

To maintain and increase effectiveness, we must renew ourselves in body, heart, mind & spirit.

Notes

“ Working with Elinor has been an invaluable investment for the growth of our business.”

In addition to the Pentlands team providing sound advice and accountancy services, we have worked with Elinor over the past 12 months in a coaching and mentoring capacity.

Our financial accounts are now presented in a way we understand and are able to work with, we also have clear monthly targets and have cut back on our services.

Rebecca Fahy, Jigsaw CCS




Elinor Perry F.C.C.A

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