



SSBS CONSULTATION PREP

Please take a few minutes to answer the following questions:

- 1. What are your primary goals for this consultation?
(e.g., event planning support, business growth strategies, clarifying ideas)**

- 2. What challenges or pain points are you currently facing?**

- 3. What's your ideal timeline for achieving these goals?**

- 4. What's your estimated budget for this project or initiative?**

- 5. Are there specific resources, tools, or vendors you've already explored?**

- 6. How would you define success for this consultation?**

- 7. Are there any additional questions or topics you'd like to cover during our session?**

This resource is provided as a general guide to assist with planning and goal-setting. It is not a guarantee of results and should be adapted to meet your specific needs. SSBS LLC and its representatives are not liable for any outcomes resulting from the use of this guide. By using this resource, you agree to take full responsibility for its application and results.



Define Your Goals with This SMART Template

Use this section to outline your goals, challenges, and actionable steps to get started. Follow the SMART criteria to make your goals clear and actionable.

Your SMART Goals should be

Specific: What exactly do you want to accomplish?

Measurable: How will you measure progress or success?

Achievable: What resources, tools, or support do you need to achieve this goal?

Relevant: Why is this goal important to you or your business?

Time-bound: When do you want to achieve this goal?

Challenges to Address

1. _____
2. _____
3. _____

Key Steps to Take

1. _____
2. _____
3. _____

Notes or Special Considerations

- For optimal organization, please complete each goal on a separate worksheet. This ensures all related information is kept clear and structured. It's perfectly fine if your goals are related; we can set dates and break them into subtasks during our consultation.

- _____
- _____
- _____

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SSBS SMART GOAL SETTING WORKSHEET

Instructions: Use the table below to outline your goals. For each row:

- **Goal:** Write what you want to achieve.
- **Assigned To:** Specify who is responsible for this goal.
- **Measure of Success:** Define how progress or success will be evaluated.
- **Obstacles:** List any challenges or barriers you may face.
- **Completion Date:** Set a realistic deadline for achieving the goal.

Goal	Assigned To	Obstacles	Due Date	Measure of Success

Feel free to bring this completed guide to your consultation, and together, we'll craft a plan tailored to your unique needs and objectives!

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