

The Business Goal Planner

Turning "grow the business" into 1-3 goals worth actually pursuing.

1. Resource Overview

Official Title	The Apex Business Goal Planner
Category	Foundation
Purpose	To turn vague ambitions like "grow the business" into a small number of specific, trackable goals with a clear first action.
Learning Objective	By the end of this resource, the owner can articulate 1–3 goals, each with a success metric, a deadline, and a defined first step.
Intended Audience	Owners heading into a new quarter, year, or planning period who want direction, not just ambition.
Estimated Completion Time	25–30 minutes

2. Educational Introduction

A Goal Without a Metric Is a Wish

"Grow the business" isn't a goal — it's a direction. Directions are useful, but they don't tell you what to do on a Tuesday. A goal becomes usable the moment it has a specific number attached, a deadline, and a first action small enough to actually start this week.

This planner is deliberately limited to three goals at a time. Not because more goals aren't valuable, but because attention is finite, and a business chasing eight priorities usually makes real progress on none of them.

Each goal gets the same simple structure: why it matters, how you'll know it's working, when it's due, and what the very first step looks like. That structure is what turns ambition into a plan.

"Clarity beats complexity. A goal with a number and a deadline is clarity. Everything vaguer than that is just a hope."

How to Use This Resource

- Start with a longer list if you need to, but narrow it to three goals maximum before finishing this resource.
- For each goal, resist writing the metric last — a goal without a number attached is usually not specific enough yet.
- Make the "first action" something you could plausibly do within the next week, not the next month.
- Revisit this planner at the start of each new period, rather than letting old goals linger unreviewed.

3. The Worksheet

Goal Filter

✓	Goal Filter	Notes
☐	This goal has a specific number attached, not just a direction.	
☐	I could explain in one sentence why this goal matters right now.	
☐	This goal is realistically achievable in the time frame given.	
☐	Pursuing this goal won't quietly work against another priority.	

Your Goals

Limit to three. If you have more candidates, that's useful information — but only three make the final list.

Goal	Success Metric	Deadline	First Action
Goal 1			
Goal 2			
Goal 3			

4. Reflection Prompts

Of your three goals, which one are you most tempted to quietly deprioritize when things get busy? Why?

If you could only accomplish one of these three this period, which would you choose — and does that match which one is listed first?

5. CEO Notes

Track obstacles, resources needed, or people to involve as they come up.

6. Key Takeaways

- "Grow the business" is a direction, not a goal. A goal needs a number and a date.
- Three goals, pursued fully, beat eight goals pursued partially.
- The first action is what separates a plan from an intention. Make it small enough to start this week.

7. Suggested Layout (Canva)

- Design the three-goal table as the visual centerpiece of the page — generous cell height, since it's meant to be revisited and referenced often.
- A small progress-tracking element (e.g., a slim gold progress bar per goal) works well if this becomes a living document rather than a one-time form.
- Keep the Goal Filter checklist visually lighter/smaller than the goals table — it's a filter, not the main event.

8. Printing Recommendations

- US Letter, landscape orientation gives the goals table more room to breathe.
- Worth laminating or placing in a sleeve if it will be referenced weekly throughout the period rather than filed away.
- Digital-first owners: a simple tracked spreadsheet or project-tool card per goal keeps the "first action" visible day to day.

9. Where This Fits in Apex Academy

Belongs In	Foundation track — a natural close to the Foundation series, feeding directly into the Planning track's Quarterly Planning Workbook.
Expands Into (Paid)	The Quarterly Planning Workbook — expands each goal into a full execution plan

Workbook)	with milestones.
Complementary Workshop	"From Direction to Deadline" — a live session on turning ambitions into trackable goals.
Supports Future Certification	Apex Certified Business Operator — Module 4: Strategic Planning.