

Long term goals

Our Delivery Notes provide clear guidelines on how to deliver a meeting, with talking points and questions to ask the client as appropriate. They're extremely comprehensive and aren't designed to be a word for word script, but a detailed guideline for you to follow and adapt to your own speaking style.

The following is a section from our **Complimentary Client Review Delivery Notes**. The text in *italics* provides additional information for the facilitator when asking the questions.

When discussing and setting goals, remember that they must be SMART (Specific, Measurable, Achievable, Realistic and Time-bound).

1. What are your specific business goals for the next 12 months?

2. What are your specific lifestyle goals for the next 12 months?

E.g. hours of work, holidays, fitness, etc.

3. What will the consequences be of not meeting these goals?

Dig deep into the pain. 'If you do what you've always done you will no longer get what you've always got' other businesses are getting smarter / more competitive so you'll lose market share and profit.

4. Who is going to hold you accountable to achieving these goals?

Many will say 'each other', but this doesn't work well as we are too soft on each other. This is a potential coaching or mentoring sale.

5. What do you think of your current levels of growth in your business?

Do they want your help to grow their business? Reference their goals; creating a clear plan with goals/actions will help them to achieve.

6. When did you last update your Business Plan?

All successful businesses have one. Is theirs on one page? Where is it located? Who's seen it? Show them yours. Potential Business Planning sale here.

7. What actions will you take to ensure your goals become a reality?

Hope is not a strategy and unless your goals are broken down into clear actions with timelines and accountability, they will remain dreams. Their actions must be specific; this is an opportunity to offer planning help to make their goals a reality.

Record the goals, actions and additional notes in the Meeting Minutes.

*The above is just one section of The Gap's comprehensive CCR Delivery Process. For more information, book a **Tour of the Gap**, or **Take a Trial**.