



# Successful Goal Planning

November 30th, 2023



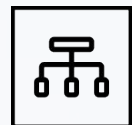
# Welcome! A Quick Intro...



## Jason Woodley - Motive Consulting

Founder/Agency Consultant

- Worked in small and large agencies for 20 years
- Led account relationships for some of world's top brands— Starbucks, Nike, Disney, Microsoft
- Thrive on helping agencies grow and increase their profitability



### Goal Framework

A framework for establishing goals, KPIs and how to deliver on them.



### Agency Profitability

Analyze client profitability and provide strategies to increase.



### Account Management

Deep dive into each account for profitability and how to grow revenue.

# Thoughts on Goal Planning

- The most important thing to do in goal planning is simply to do it. Don't hesitate, have a plan in terms of what you want to achieve for 2024!
- If new to goal planning, go with a simple rather than a complex plan. KISS - "Keep It Simple and Straightforward".
- Ensure goals are SMART (Specific, Measurable, Achievable, Relevant, Time-bound).
- Once goal planning is complete, communicate the plan to the entire team. This is very important for the team to understand the company direction.
- Follow up on goal planning and measure how you are doing against the goals (recommend monthly). Use traffic light status monitoring.
- Goal planning is not just for the agency owner to own and drive. Ensure key leaders own goals and are accountable for them.
- You can also use goal planning for individual clients/accounts (account growth plans). The same process applies.

# Template for Goals

North star for the agency. What is the one goal that you need to achieve in the year to be a successful?  
Example: Overall Revenue, profit, etc.

**Overall Goal**

What are the goals that will help you obtain the overall goal?

**Goal #1**

**Goal #2**

**Goal #3**

What are the tactics that need to be completed (and assigned ownership) that will help you obtain the goal?  
If you accomplish the tactics then the goal should be achieved.

**Tactic #1**

**Tactic #2**

**Tactic #3**

**Tactic #4**

**Tactic #1**

**Tactic #2**

**Tactic #3**

**Tactic #4**

**Tactic #1**

**Tactic #2**

**Tactic #3**

**Tactic #4**

What are the measures being used to track if progress has been made and goals have been achieved?

**Measures**

**Measures**

**Measures**



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Measures

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Measures

# Example Agency - Goals for 2024

Goals

**\$7.0 MILLION REVENUE**

**Grow existing clients by 20% in Revenue**

Owner

**Cultivate New Business to \$1.0M**

Owner

**Develop New Capabilities**

Owner

Tactics

- Visit clients on site at least 1x/month
- Bring new ideas to our existing clients at least 2x/year
- Complete account growth plans by end of January
- Conduct mid-year account check-ins

- Build a strong pipeline of at least 20 opportunities that can deliver a minimum of \$250k annually
- Cultivate at least one new strategic partner per quarter
- Deliver a webinar each quarter for prospective opportunities
- Close at least 2 new opportunities every quarter

- Develop new capability to sell to new and existing clients by April Q2
- Build specialized skills with the team that delivers revenue growth by end of Q2

Measures

- Increased revenue of each account over 2023 numbers
- Total Revenue from new accounts
- Revenue from new capabilities

# Goal Planning - Timing





## Q & A

Thank you! Please get in touch if you have any questions or need additional information.

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### Contact Information

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