

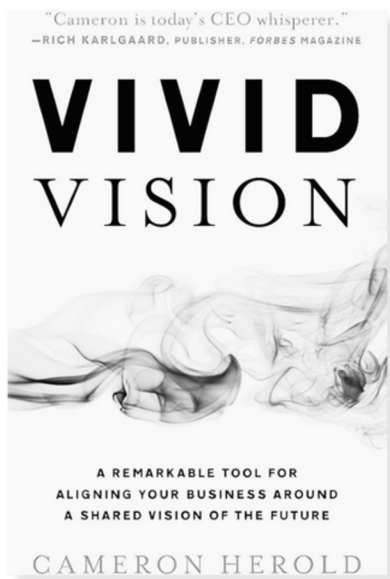
*At-home printer friendly. Note that instructors
will reference the color version in training.*

THE GOAL SETTING WORKBOOK FOR 2025

Use this workbook throughout all the CSP
training in December.

You will produce a Q1 + 2025 vision and
plan of action.

BOOKS FOR CEOS IN “THINKING BIG” MODE



Vivid Vision

Cameron Herold



10x Is Easier Than 2x

Dan Sullivan



The Art of Impossible



The Pivot Year



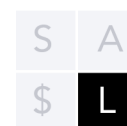
Mind Magic



BEGINNER

INTERMEDIATE

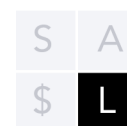
ADVANCED



THE CAN YOU IMAGINE WALL

On the walls of the HQ for Blue Origin are written aspirational that go way beyond “You can do it!” Example: “*Imagine dropping your kids off for space camp, and they go off in an actual spaceship.*” Very, very big picture thinking. This is your wall for the same. **Inspire yourself.**

That time when I go into my inbox and realize I really should get back to Tony Robbins to let him know I can only speak at his event this year if he sends the private jet.



WHAT I'VE HEARD FROM OTHERS

Consider the best ideas others have shared in Copy School Professional.

IDEA	WHO SAID IT	WHY I LIKE IT

AUDITING 2024: MY SKILLS

The category of “skills” includes the skills you sell (e.g., conducting interviews), the skills you use for your digital business (e.g., list building) and proof of skills.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

AUDITING 2024: MY AUTHORITY

The category of “authority” includes your area of specialization and how well you own it; partnerships and biz dev; marketing and branding; and execution of all.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

AUDITING 2024: MY MONEY

The category of “money” includes serving the right audience for your financial goals, offering them something irresistible and closing them on projects + retainers.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

AUDITING 2024: MY LEVERAGE

The category of “leverage” includes AI, systems, processes, people and ways to make your business scale rather than depending on you. Leverage is freedom.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

AUDITING 2024: MINDSET

The category of “mindset” is massive. This is *your relationship with you* - do you trust yourself vs others, do you decide for yourself, do you second guess, etc?

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

BASED ON WHAT HAPPENED IN 2024

In 2025, I will do MORE of this:

In 2025, I will do this BETTER:

In 2025, I will do very little that is NEW, but if I must, this is what it will be:

IT'S DEC 31, 2027...

Picture yourself in your most reflective zone. This could be on a deck with your journal in hand... at the public pool with your kids taking swimming lessons as you open the Notes app on your phone... taking your laptop for a coffee... or sitting exactly where you are right now. When you're there, begin this page and the next.

What do you see when you encounter your brand from a distance? Perhaps you see one of your ads running while you're scrolling IG.	
What do you hear when people talk about your brand? Who's talking about you? Why?	
Who are your best clients, and what do they tell their peers about you?	
What do content creators, influencers and peers share about you? What's the buzz?	
Who works for you, and what do they say about being on your team?	

What do you do in a week?	
How does your brand show up in marketing?	
What stretch challenge did you do massively well?	
How is the company running day to day?	
What do you see when you look at your bank? What's revealed to you in QBO?	
How do you feel when you reflect on 2025?	

☐ I have written my Vivid Vision and posted it to my website.

WHAT DO I NEED TO DO TO LIVE THAT VISION IN 2027?

In 2025	
In 2026	
In 2027	

WHAT ARE THE CONSTRAINTS I NEED TO REMOVE?

In 2025	
In 2026	
In 2027	

MY VISION FOR 2025: SKILLS

OBJECTIVE	KEY RESULTS

MY VISION FOR 2025: AUTHORITY

OBJECTIVE	KEY RESULTS

MY VISION FOR 2025: LEVERAGE

OBJECTIVE	KEY RESULTS

MY VISION FOR 2025: MONEY

OBJECTIVE	KEY RESULTS

CEO PURPOSE STATEMENT FOR 2025

COMPANY NAME: _____

CEO NAME: _____

DATE OF STATEMENT: _____

FINANCIALS

	2024	2025
REVENUE GENERATED		
SALARY TAKEN		
BONUSES / DIVIDENDS TAKEN		
PROFIT (Left in bank)		
KEY EXPENSES		
CLIENTS SERVED		
CLIENTS LOST		
PROJECTS UNDERTAKEN		
RETAINERS UNDERTAKEN		

MY BIGGEST TARGET FOR 2025 IS:

WHAT NEEDS TO HAPPEN TO GET THERE BY DEC 31, 2025

Q4

Q3

Q2

Q1

2025 PLAN ON A PAGE

#1 Goal This Year	Q1
	Q2
	Q3
	Q4

Skills I Sell, Skills I Use, Proof of Skills

Authority, Branding & Business Dev.

Money (Audience, Offers, Etc)

Leverage (People, Systems, AI, Etc)

Mindset

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MY BIGGEST TARGET FOR Q1 IS:

WHAT NEEDS TO HAPPEN TO GET THERE BY MAR 31, 2025

Skills I Sell, Skills I Use, Proof of Skills

Authority, Branding & Business Dev.

Money (Audience, Offers, Etc)

Leverage (People, Systems, AI, Etc)

Mindset

TO DO LIST

Good ideas you will do this quarter.

WILL NOT DO LIST

Good ideas you won't do this quarter.



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HOW TO USE AI TO GENERATE DAILY TO-DO LISTS