

A woman in a white dress is shown from the waist up, pouring champagne from a bottle into a flute glass. The bottle is labeled 'MOET & CHANDON' and 'BRUT'. The glass is partially filled with champagne. The background is a soft, out-of-focus white.

EVER, RAE

I SAID YES

Goal Planning Worksheet

@itseverrae

Ever, Rae

GOAL PLANNING WORKSHEET

Below you will find an example of writing out your OKR's to a wedding specific business. This is the exact method I used when leveling up my wedding planning business.

OKR's Q1

Example:

As a wedding planner I wanted to move my business towards a Full Planning and Design business only. My year end goal was having only Full Planning and Design clients booked for the following year while still matching or exceeding my current income.

Q1 Objective 1 - Reframe my branding to ensure it aligned with my goals and spoke to the clients I was intending to reach.

- Result - A refined and intentional brand with a full web design and social media platform shift that would speak to my ideal clients.

Objective 2 - Restructure my pricing to reflect the updated amount of work that would be involved in each client experience while ensuring a payout that would create an equal or better income to my current one.

- Result - An estimated expense report for the year & income floor broken down month by month for rollover to create a safety net. This created booking freedom.

Objective 3 - Begin introducing my new brand with an official brand roll out plan.

- Result - Full branding roll out plan complete with intentional meet and greets and networking opportunities. New relationships within the industry that align closer to my end goal.

Ever, Rae

GOAL PLANNING WORKSHEET

Write your Year End Goal Here

OKR's Q1

Q1 Objective 1 -

- Result -

Objective 2 -

- Result -

Objective 3 -

- Result -