

After The Pitch *Project*

Before diving into this guide, take a moment to get in the right headspace. Find a quiet space where you won't be interrupted, and grab a pen, notebook, or open a digital document to capture any thoughts or ideas that come up as you work through each page. Give yourself permission to take your time with this. This process is all about clarity and intention, so relax, focus, and reflect deeply on each section.

Remember, this isn't about perfection or having all the answers right away; it's about creating a clear vision and strategy to build on. Take breaks if you need, and don't rush—sometimes the best ideas and insights come when we give ourselves room to think. And if you have questions, or if you'd like to share your completed worksheet, feel free to reach out via email. I'd be thrilled to help you and hear about your progress. Let's get started and make this year your most focused and fulfilling one yet!

Don't rush through it—take some time to reflect. The more honest you are here, the more useful this exercise will be for setting up a stronger year ahead. Let's break it down step-by-step.

Top 6 Accomplishments

What were your proudest moments this year? Think of six things that went well or moments where you felt proud, accomplished, or just relieved you finally finished! These can be big wins, like landing a major client, or smaller victories, like nailing a difficult conversation with a team member.

Examples:

- Successfully launched a new product or service.
- Finally organized the office (or digital workspace!).
- Increased your client base by 20%.
- Took a weekend off without checking emails.
- Implemented a process that saved you time or money.
- Built a stronger relationship with a mentor or peer.

Take your time listing these—it'll remind you of how far you've come!

What Were You Most Afraid Of?

Let's get real here—what had you hesitating, nervous, or even a bit scared this year? This is a powerful section because our fears often reveal areas we need to work on or understand better. These might be business-related fears, like hiring someone new, or personal ones, like public speaking. Don't hold back.

Examples:

- Afraid to increase prices in case clients pushed back.
- Nervous about trying a new marketing strategy.
- Hesitant to network with other business owners.
- Scared of failing at something big, like launching a new product.

Knowing your fears can help you address and grow beyond them next year.

Setbacks or Roadblocks

What got in your way? Time to look at the obstacles. These are the things that held you back, slowed you down, or even caused you to shift gears. Were they external (like a slow season) or internal (like procrastination or self-doubt)?

Examples:

- Unexpected expenses.
- Burnout from taking on too much at once.
- Difficulty finding reliable suppliers.
- Overwhelmed by a lack of clear direction.

Think about what these setbacks taught you, and let's keep that in mind for the next section.

Things to Learn

What do you want to get better at or finally learn? Here's where you write down the skills, knowledge, or tools that would help make things easier or take you to the next level. Don't limit this to just business skills—anything that can help you grow counts.

Examples:

- Learning how to make data-driven decisions.
- Improving on social media marketing.
- Getting comfortable with public speaking.
- Learning a new software to manage finances or projects.

Things to Change

What needs a tweak or maybe even a complete overhaul? Write down what didn't work this year that you'd like to do differently. This could be anything from how you handle stress to the way you delegate tasks.

Examples:

- Change how you handle time management.
- Adjust your client onboarding process.
- Be more intentional with weekly goal setting.

Start, Stop, Continue

This is your roadmap for next year! In this section, think about what actions you want to start doing, stop doing, and keep doing based on your reflections. Be specific!

Start: What's something you haven't done but would benefit you?

Example: Start networking with other local business owners monthly.

Stop: What's something you've been doing that's not helping?

Example: Stop overcommitting to too many tasks each week.

Continue: What's something that's working well and should keep going?

Example: Continue setting aside a day each month for strategy and planning.

Six Things You Didn't Get Done but Still Need to Do

This is your "incomplete" list, but don't worry—it's totally okay!

There are always things that didn't make the cut this year but are still important. Jot down anything you still want to tackle. You'll get the chance to carry these over into your goals for next year.

Examples:

- Update your website.
- Set up a new client management system.
- Finish that online course.
- Clean up your accounting files.

Yearly Review

YEAR _____

TOP ACCOMPLISHMENTS

○	
○	
○	
○	
○	
○	

WHAT WERE THE THINGS YOU WERE MOST AFRAID OF?

SETBACKS OR ROADBLOCKS

THINGS TO LEARN

THINGS TO CHANGE

START

STOP

CONTINUE

THINGS I DIDN'T GET DONE, BUT STILL NEED TO DO

○	
○	
○	
○	
○	
○	

This page is all about you—what’s important to you, what you want to change, and how you want to show up in the world. These questions focus on your core values, so take your time, be honest, and don’t be afraid to dream big. Let’s go through each one!

What Would I Like to Change Spiritually in My Life?

Think about the deeper side of life. How do you want to grow or connect spiritually? Spiritual change doesn’t have to mean a major overhaul. Maybe it’s about making more time to be still, or finding ways to connect with something bigger than yourself. This could be about inner peace, faith, meditation, gratitude—whatever feels right for you.

Examples:

- “I’d like to start each morning with five minutes of meditation.”
- “I want to get back into the habit of expressing gratitude daily.”
- “I’d like to explore more about my faith or spiritual beliefs this year.”

Don’t worry if this one feels a bit abstract. It’s more about the mindset you want to have when things get tough rather than a strict goal.

What Are My Physical Health Goals?

Let’s talk about taking care of the body. What are some physical goals that you’d like to work on? This is all about your health and well-being. Physical goals can be anything from wanting to feel more energetic, trying a new exercise routine, or eating a little better. Be realistic but also don’t be afraid to challenge yourself!

Examples:

- “I want to work out three times a week—maybe try a mix of yoga and strength training.”
- “I’d like to cook more meals at home to eat healthier and save money.”
- “I’m aiming to get 8 hours of sleep each night to feel more rested.”

Even small steps here can make a big difference over time, so focus on what feels achievable and meaningful.

What Relationships Would I Like to Improve?

Reflect on areas of your life where you’d like to feel more positive or balanced. We all have areas where our relationship could use some TLC, whether it’s with people, money, food, or even time management. Think about where you’d like a healthier, less stressful, or more joyful relationship.

Examples:

- “I want to work on my relationship with money and build better budgeting habits.”
- “I’d like to improve my relationship with food—focus on enjoying it without guilt.”
- “I want to nurture my friendships by reaching out more often.”

Pick one or two areas and think about specific actions that could help improve these relationships.

How Will You Enhance Your Brand?

When people think of you, what do you want them to associate with your name? Your brand isn't just your professional image—it's how you present yourself, both in your career and personal life. Think about what qualities or achievements you want others to see and appreciate

Examples:

"I'll post more regularly on LinkedIn to share insights and build my professional presence."

"I want to be known for my reliability, so I'll focus on meeting deadlines consistently."

"I'll work on building a stronger online portfolio to showcase my skills."

Whether it's online or in person, think about how you can communicate your values and strengths.

What Will People Say About You When You're Not Around?

Imagine what others will say about you based on your actions and character. What do you want that to sound like? This one's about the legacy you're building day by day. Picture the positive things people could say—are you helpful, trustworthy, a great listener? What would make you proud to hear?

Examples:

- "They'd say I'm someone they can count on."
- "People would describe me as empathetic and someone who's always willing to lend a hand."
- "They'd think of me as hardworking and passionate about what I do."

Consider the qualities you want to embody and think of ways to show them more in your daily life.

What Do You Plan to Do for Your Personal Enjoyment?

Life's about more than work and responsibilities. What are you going to do just for the joy of it? This is where you get to think about fun! What activities or hobbies bring you joy? It could be something new or a favorite pastime you want to make more time for.

Examples:

- "I want to take one weekend each month for a mini adventure—maybe a hike or day trip."
- "I'd like to read more novels just for fun."
- "I'm going to learn how to play the guitar—something I've always wanted to do!"

Your enjoyment is important, so make it a priority and put it on the calendar.

PERSONAL CORE VALUES

What would I like to change spiritually in my life?

What are my physical health goals?

What relationships would you like to improve? (ex. people, money, food)

How will you enhance your brand? What will people say about you when you're not around?

What do you plan to do for your personal enjoyment?

This next worksheet is all about getting clear on the “who,” “what,” and “how” of growing your business. You’ll dig into who you’re targeting, the best ways to reach them, and how to set concrete goals. Let’s get started!

Market Focus and Customer Profiling

This is where you get specific about your audience and their needs.

Each column will help you break down and refine who your customers are, where you can reach them, and what they care about. Fill out each column with what you know about your target market or where you need to do some research.

Market Expansion: Think about new areas where you can grow. These might be untapped regions, industries, or demographics that could benefit from what you offer.

Example: Expanding into nearby cities that have similar business needs but less competition.

Pain Points: Identify the key issues or problems your ideal customers face. These are the problems you want to solve with your product or service.

Example: For small business clients, a major pain point might be finding affordable marketing services that drive results.

Niche Identification: Who are the people who would benefit most from your offerings? Try to pinpoint a specific niche where your business can stand out.

Example: Local health and wellness brands seeking affordable content creation for social media.

Behavioral Analysis: Consider what motivates your customers. Are they driven by convenience, price, quality, or another factor? Think about their decision-making process.

Example: Customers looking for eco-friendly products who value sustainability and are willing to pay a premium for it.

Getting clear on these will help you focus your marketing efforts and speak directly to the people who need you.

Sales Blueprint

This section is all about how you sell and retain customers.

Here, you’ll map out your approach to delivering value and keeping customers happy. Fill out each area with bullet points to guide your sales strategy.

Value Proposition: This is a clear, compelling reason why customers should choose you over the competition. What unique value do you offer?

Example: “We provide high-quality, custom solutions tailored for small businesses at a price they can afford.”

Retention Tactics: Think of ways to keep customers coming back. These could be loyalty programs, regular follow-ups, or exclusive offers.

Example: “Offer a monthly check-in call for top clients to ensure satisfaction and discuss potential new projects.”

Funnel Improvements: Consider where people drop off in your sales process and how you can smooth that journey to keep them moving toward a sale.

Example: “Add more educational content at the top of the funnel to increase trust and awareness.”

Competitor Analysis: List a few strengths and weaknesses of your main competitors. Knowing what they do well (or not so well) can help you refine your own approach.

Example: “Competitor A is strong in online marketing but has poor customer service reviews—focus on providing an exceptional customer experience.”

This section is about building a solid foundation for both attracting and keeping customers.

Lead Development

Here’s where you brainstorm ways to bring in new leads and keep them engaged. These are practical ideas for reaching potential customers and guiding them to your business. Think of each area as a toolkit for developing and nurturing leads.

Digital Outreach Efforts: How are you connecting with leads online? Consider social media, email campaigns, and digital ads.

Example: “Run monthly webinars on topics relevant to potential customers and collect emails for follow-ups.”

Referral Program Ideas: Think about incentives for your current customers to bring in new leads. A simple referral program can work wonders!

Example: “Offer a discount to both the referrer and the referred client on their next project.”

Lead Nurturing Ideas: Once you’ve made contact, how can you stay on their radar until they’re ready to buy? This could be educational content, special offers, or check-ins.

Example: “Send a monthly newsletter with helpful industry tips and case studies.”

Cold Calling Strategy: Cold calling can still be effective, especially with the right approach. Consider your angle and what message you want to communicate upfront.

Example: “Research prospects in advance and start the call by addressing a common pain point, like improving efficiency in small business operations.”

Building a steady pipeline of leads keeps your business growing. Experiment with different approaches and track what works best.

Revenue Targets and Performance Benchmarks

Let’s talk numbers! Setting realistic sales and revenue targets gives you something concrete to aim for.

Each column here is designed to help you outline and track your financial goals. Use these targets and benchmarks to guide your business decisions over the next year.

Sales Forecast: This is your best estimate of how much revenue you expect to bring in. Start with a conservative estimate, based on past performance or industry standards. Example: “Based on last year’s growth, aiming for \$100,000 in sales for the next year.”

Stretch Goals: These are ambitious but achievable targets if things go better than expected.

Think of them as a “reach” goal that challenges you.

Example: “Stretch goal: If we increase our conversion rate by 10%, aim for \$120,000 in sales.”

Milestone Setting: Break your forecast down into smaller steps. These milestones will help you track progress along the way.

Example: “Milestone 1: Reach \$25,000 by end of Q1.”

Sales Performance Metrics: These are the numbers you’ll track to see how well you’re doing. Common metrics include conversion rate, average order value, or client retention rate.

Example: “Track monthly conversion rate, aiming to increase from 10% to 12% by the end of the year.”

Setting up these benchmarks gives you clear targets to work toward and helps you stay motivated in 2025.

GROWTH STRATEGY

MARKET FOCUS AND CUSTOMER PROFILING

Market Expansion	Pain Points	Niche Identification	Behavioral Analysis

SALES BLUEPRINT

Value Proposition
Retention Tactics
Funnel Improvement
Competitor Analysis

LEAD DEVELOPMENT

Digital Outreach
Referral Program
Lead Nurturing
Cold Calling

REVENUE TARGETS AND PERFORMANCE BENCHMARKS

Sales Forecast	Stretch Goals	Milestone Setting	Salesperson Performance Metrics