### **Cannabis Financial Cohort Goal Setting Worksheet**

**Introduction:**

Taking the time to set goals for the program at the start helps you align intentions with outcomes, create a plan for success, and maintain accountability. Take this opportunity to set goals for the cohort that align with your business goals over the next 6 to 18 months.

This worksheet is designed to help you identify your cohort goals, outline actionable steps, and track your progress. By setting goals and identifying steps and needed resources, you’ll be more likely to achieve meaningful results with this free six-month program designed to support your cannabis business.

**Complete by:** This worksheet will be the guide for your first coaching session, so please complete prior to attending your first 1:1 session.

### **1. Define Your Primary Goals**:

### Identify the key goals you want to achieve during the cohort program. Consider what you want for your business in the next six to 18 months and what you want for yourself as an entrepreneur. Document that.

### Think of your most important goals (max two) that you want to achieve for your business over the next six to 18 months:

### **Macro Business goal 1:**

### **State the goal in 1 to 2 sentences and include important sub-goals, the smaller steps that get you to the macro goal:**

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### **What do you need in place to make that happen?**

### \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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### **Macro Business goal 2:**

### **State the goal in 1 to 2 sentences and include important sub-goals, the smaller steps that get you to the macro goal:**

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### **What do you need in place to make that happen?**

### \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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### **2. Anticipate Potential Barriers**

Identifying potential obstacles is key to successful goal attainment. Think about the challenges you might face and how you can overcome them. This proactive approach allows you to be prepared and flexible, minimizing disruptions to your progress.

#### **Challenges and Potential Barriers:**

* **Barrier 1:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Action Plan:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Barrier 2:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Action Plan:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Barrier 3:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Action Plan:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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### **3. Resource Allocation and Support**

To achieve your goals, it is important to identify the resources you will need. These could include mentorship, tools, training, or access to specific networks. Consider both internal and external resources that will support your journey.

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#### **Resource Needs:**

* **Financial Support:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Mentorship/Coaching:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **External consultants/ internal hires:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Training/Workshops:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Other Resources:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **4. How can the Cohort can help you reach your goals**

What financial acumen do you need? What knowledge do you need? What expertise do you need?

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#### **5. Cohort Goal SMART Breakdown:**

* **Specific:** What exactly do you want to accomplish?
* **Measurable:** How will you know when the goal is achieved?
* **Achievable:** Is this goal realistic, and what actions will you take to ensure it’s within reach?
* **Relevant:** How does this goal align with your personal or professional aspirations, as well as the objectives of the cohort?
* **Time-bound:** What is the deadline for completing this goal?