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

**Introduction:**

As members of this cohort, you have a unique opportunity to set your goals for the cohort that align with your personal and business goals. This worksheet is designed to help you identify your cohort objectives, outline actionable steps, and track your progress. By setting goals and identifying steps and needed resources, you will be more likely to achieve meaningful results.

Additionally, this process helps you align your intentions with your desired outcomes, create a strategic plan for success, and maintain accountability throughout the program. Let’s begin by setting goals that not only push you toward personal growth but also contribute to the shared success of the cohort.

### **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 12 months to five years and what you want for yourself as an entrepreneur. Document that.

#### **Primary Goals for your business in one year or five years (you decide):**

### **Business goal in \_\_\_\_ year:**

### **State the goal in 1 to 2 sentences:**

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

### **What does that look like? Describe how the goal looks to other people**

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

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

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

### **Entrepreneur goal:**

### **Why did you become an entrepreneur?**

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

### **What did you want for yourself from this business?**

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

### **Does your business goal above align to what you want for yourself?**

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

### **Why is the business goal above important to you?**

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

### **2. What will the business goal cost in money and time?**

### Money: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

What do you need to secure funding?

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

#### **Cohort Goal SMART Breakdown:**

* **Specific:** What exactly do you want to accomplish?
* **Measurable:** How will you track progress and 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?

### **3. 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:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **4. Develop Actionable Steps and Initiatives**

Break down each goal into actionable steps. This approach ensures that you stay on track and can measure progress over time. The more specific your action steps, the easier it will be to maintain focus and momentum.

#### **Goal 1 Action Plan:**

* **Step 1:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Responsible:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Timeline:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Step 2:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Responsible:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Timeline:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Step 3:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Responsible:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Timeline:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **6. 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.

#### **Resource Needs:**

* **Financial Support:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Mentorship/Coaching:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Training/Workshops:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Other Resources:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **7. Accountability and Progress Tracking**

Accountability is critical for success. Identify who will hold you accountable for your goals, and set up a system for tracking progress. Consider regular check-ins with a mentor, cohort member, or team leader to review your progress, discuss any challenges, and refine your approach.

#### **Accountability Partners:**

* **Goal 1 Accountability:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Progress Check-ins:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Frequency of Check-ins:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Goal 2 Accountability:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Progress Check-ins:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Frequency of Check-ins:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Goal 3 Accountability:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Progress Check-ins:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ **Frequency of Check-ins:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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