



# SMART GOALS

A GUIDE TO SETTING SMART  
MARKETING GOALS

2020

# DEFINING SMART MARKETING GOALS

## ABOUT THE WORKBOOK

The goal setting workbook helps you determine clear and measurable goals while encouraging you to think about how you'll achieve them. Whether you're looking to make a goal for this month or next quarter, this template can ease you in to the process.

## HOW TO USE THIS TEMPLATE

Below, you'll find an example of a marketing goal on the left, and an adjacent space for you to create your own. For best results, we recommend starting in the **"Initial Goal"** box and working your way down through each aspect of a goal.

### EXAMPLE INITIAL GOAL

*I want to increase sales*

### YOUR INITIAL GOAL

## Step 1: Make it Specific

Without defining exactly what you're trying to improve, it is difficult to outline the steps you need to take to make progress. A specific goal is one that you could share with other decision makers that would clearly explain what you're trying to improve.

### SPECIFIC EXAMPLE

*I want to increase sales of holiday gift baskets*

### YOUR SPECIFIC GOAL

## Step 2: Make it Measurable

It's crucial that your goal is trackable and numeric. Many teams simply say that they want to grow their leads, but they don't specify by how much. As soon as you attach a value to your goal, you'll be able to track your progress to reaching your goal as your campaign runs.

### MEASURABLE EXAMPLE

*I want to increase sales of holiday gift basket by 10% YOY*

### YOUR MEASURABLE GOAL

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## Step 3: Make it Attainable

We've found that to be successful, you have to be realistic. If you've historically generated 100 qualified leads in a month, setting a goal to generate 500 in a month would be unrealistic. Set yourself up for success by starting with small goals until you're able to reach your larger goals.

### ATTAINABLE EXAMPLE

*Since I sold 100 holiday gift baskets last year, I want to sell 10% more YOY*

### YOUR ATTAINABLE GOAL

## Step 4: Make it Relevant

Ask yourself why you're setting the goal that you are. How is it going to contribute to the company's bottom line? Ultimately, the marketing goal you set should be tied back to business impact. If it's not, consider how you can change or adjust your initial goal.

### RELEVANT EXAMPLE

*I've developed my organic content strategy and padded additional budget specifically to promote my holiday gift baskets*

### YOUR RELEVANT GOAL

## Step 5: Make it Timely

Finally, ensure you set a timeline for meeting your goal. Without a timeline, you won't be able to determine whether the smaller changes you've made kept you on track toward achieving your ultimate goal. Setting a timeline can also be beneficial for internal alignment. When you're generating significantly more leads, it's vital to ensure your staff is prepared.

### TIMELY EXAMPLE

*I want to sell 10% more holiday gift baskets YOY from October – December through a series of blog & content pieces & paid media*

### YOUR TIMELY EXAMPLE