



Goal Setting Guide

Clarify your direction. Measure your progress. Build your business.

Introduction: Why Goal Setting Matters More Than You Think

At Underpin, we believe goal setting isn't just a nice-to-have, it's a foundational business skill.

Too many business owners set vague goals, chase arbitrary numbers, or give up when progress doesn't show up fast enough. Real, sustainable growth doesn't happen by accident. It happens when you have a clear destination, a meaningful reason to pursue it, and a plan to take consistent action toward it.

This guide is designed to help you develop that skill. Inside, you'll learn a simple, repeatable framework to clarify your goals, map the actions that will drive results, and stay accountable over time. You'll also learn how to track progress using leading indicators, so you can adapt as you go, instead of waiting until it's too late.

Why Most Goal Setting Fails

Let's be honest: most goal-setting is wishful thinking dressed up as strategy. - "I want to hit \$100K this year." - "I should be more active on social media." - "It'd be nice to grow my email list."

These aren't goals. They're vague intentions with no strategy behind them.

At Underpin, we believe that goal setting is a business discipline. And like any discipline, it can be learned, practiced, and repeated.

This guide gives you a clear, structured approach to setting and achieving goals—so you're not just hoping for progress, but actively creating it.



The Underpin Goal Framework: What / Why / When / How / Who

Use this framework to define one strategic business goal at a time. It's simple, repeatable, and built for real-world execution.

WHAT – The Goal (Lagging Indicator)

What result are you trying to achieve? This is your outcome.

WHY – The Reason

Why does this goal matter now? How does it align with your current business needs?

WHEN – The Timeframe

By when will this be completed? Be specific and realistic.

HOW – The Actions (Leading Indicators)

What measurable, repeatable actions will lead to the goal?

- These should be within your control and trackable.
- Don't count on things like "getting lucky" or "going viral."

WHO – The Accountability

Who owns this goal? Who are the stakeholders and partners? Who will you report progress to, or ask for support? Who will help you stay accountable?

Leading vs. Lagging Indicators: What You Must Understand



Most business owners think in terms of **lagging indicators**: - Revenue - Number of clients - Instagram followers

These are *results*. They're important, but you only see them *after* the work is done.

The real power comes from identifying **leading indicators**: outreach emails sent, content posted, proposals delivered, client follow-ups made.

- Important: A leading indicator must be something you can control.
- Example:









-  A farmer trying to increase crop yield can track fertilizer usage.
-  The weather is not a leading indicator—it's influential but uncontrollable.

If you focus only on lagging indicators, you're just watching the scoreboard. If you track the right leading indicators, you're actually playing the game.

Measure What Matters – Using a Scorecard

Once you've defined your goal, don't just set it and forget it. You must measure progress over time to ensure you're on track—and adjust your strategy if needed.

That's where a scorecard comes in. Think of it as a simple weekly check-in tool that helps you track your leading indicators.

Week	Outreach Emails Sent	Blog Post Published	Proposals Sent
1	    		 
2	   		

Every week, ask yourself:

1. Am I taking the actions I said I would?
2. Are those actions producing results?
3. Do I need to double down, shift tactics, or change course?

The scorecard isn't about judgment, it's about awareness. Awareness leads to adjustments. Adjustments lead to results.

You don't need fancy software. You just need a way to check in regularly on whether your actions are moving the needle.



Example Goal – Fully Built Out

WHAT: Book \$10,000 in monthly recurring revenue by October 1st

WHY: Hitting this revenue milestone allows me to pay myself, cover business expenses, and prepare to hire support

WHEN: 90 days from today

HOW (Leading Indicators, minimum of 3):

1. Send 5 personalized outreach messages per weekday
2. Publish 1 thought leadership post on LinkedIn per week
3. Host 2 webinars to generate leads and discovery calls
4. Follow up with all warm leads within 48 hours
5. Track all sales activity in CRM weekly

WHO: I'm responsible for all activities; my VA helps with scheduling; my accountability partner checks in every two weeks.

If I'm doing the HOW weekly, I'll know long before October whether this goal is achievable—or if I need to adapt.

Now It's Your Turn

How to Use This Guide

- Print the worksheet on the following pages
- Complete the framework for one goal
- Check in weekly on your leading indicators
- Update as needed and repeat for the next priority



WHAT:

WHY:

WHEN:

HOW (Leading Indicators):

1.

2.

3.

4.

5.

WHO:



SCORECARD

How will I track my progress each week?

Optional Reflection

- How confident do you feel in this goal (1–10)? ____
- What could derail your progress?

- What support or accountability would help you stay consistent?

Bonus: Repeat & Compare

Repeat the process for another goal. Once complete, compare goals: Are they competing or complementary? Do you have the capacity to pursue both? Which should come *first*? Often times once goal can be turned into a leading indicator for a larger goal, so think as high level as you can to make the goal as meaningful as possible.

Ready to build your own scorecard, or get help turning your goal into a full growth roadmap?

Let's talk: jonathan@underpinconsulting.com