

Service Business Goal-Setting Template

Short-Term Goals (First 6 Months)

These are your early wins—milestones that establish credibility and momentum.

Goal	Owner	Due Date	Status	Notes
	[Name]		Not started / In progress / Completed	
Sign first three clients				
Finalize pricing structure				
Launch website and social media				
Build basic client intake process				
Gather first client testimonials				

First-Year Goals (Months 6–12)

These goals help you reach operational stability and start to scale.

Goal	Owner	Due Date	Status	Notes
	[Name]		Not started / In progress / Completed	
Reach break-even revenue				
Maintain 5-star client reviews				
Create repeatable workflows for services				
Secure recurring or retainer clients				
Hire or engage your first contractor				

■ Long-Term Goals (3–5 Years)

These stretch goals support larger growth, expansion, and sustainability.

Goal	Owner	Due Date	Status	Notes
	[Name]		Not started / In progress / Completed	
Launch new service or service package				
Expand into a new industry or market				
Build a distributed team of experts				
Systematize client onboarding and delivery				
Increase annual revenue by [%]				

■ Quarterly Review

Use this section to reflect and make adjustments as needed.



What worked well?

What didn't go as planned?

What should we adjust or improve next quarter?

Next key priorities: [List 2–3 top goals to focus on]