



TREK INSTITUTE
A BASE CAMP CO-OP FOR SUCCESS

TREKIN GUIDE BOOK

FOUNDATIONS

SETTING GOALS THAT STICK





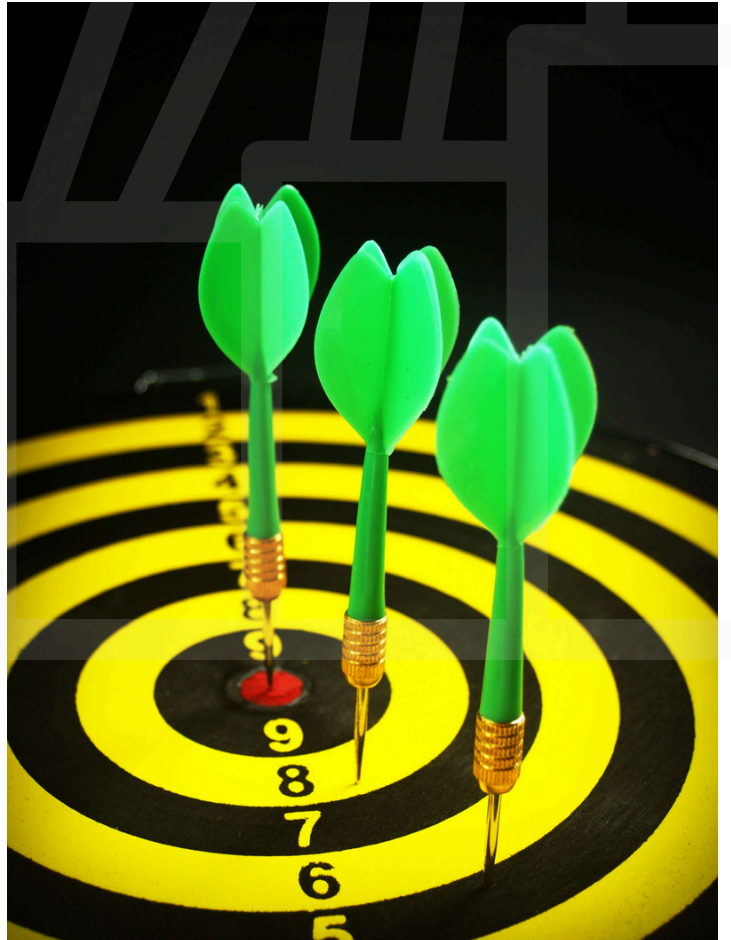
SETTING GOALS THAT STICK

WHY GOALS FAIL AND HOW TO FIX IT

Setting goals is simple; Achieving them is where most people and businesses struggle. Whether it's a business-wide growth objective, a professional development plan, or a personal milestone, goals often start with enthusiasm but fade into the background as daily demands take priority. The disconnect between setting a goal and actually achieving it comes down to one fundamental issue: *Structure*.

Too often, goals are vague, overly ambitious, or missing a clear roadmap for execution. A statement like "grow my business" is inspiring, but without a defined target, measurable steps, and accountability, it's just an idea. The same applies at a personal level, saying, "I want to become a better leader" is admirable, but without a structured plan to improve communication, delegate effectively, or develop leadership skills, there's no path forward. Goals don't stick when they aren't actionable.

Goals should be more than words on paper. They should be integrated into daily workflows, tracked over time, and adjusted as necessary to stay relevant.





Getting Goals Out of the **GREAT IDEA PHASE**

It's easy to set a goal. However, it's much harder to carry it through to completion. Many goals start with excitement, but somewhere between setting the intention and executing the plan, they lose momentum. Why? Because most goals get stuck in the idea phase, never transforming into real, actionable steps. This happens for a few key reasons.

Common Pitfalls in Goal-Setting

Lack of Specificity: A goal like *"grow my business"* is vague. Does it mean increasing revenue, expanding services, hiring more staff? Without a clear, measurable target, it's impossible to determine success.

No Plan for Execution: Even well-defined goals can fail if there isn't a structured plan. Simply stating *"I want to increase client retention"* isn't enough. What specific actions will lead to that outcome?

Failure to Anticipate Obstacles: Setbacks happen. Many people abandon goals at the first sign of difficulty because they didn't plan for challenges or build flexibility into their strategy.

Missing Accountability: Goals often lose steam because there's no system for tracking progress. Without clear checkpoints, it's easy to let a goal fade into the background.

Big Picture Goals Don't Work

Without a breakdown of specific, measurable, and time-bound objectives, goals remain conceptual rather than actionable. The brain needs clarity to stay engaged.

Instead of...

"Improve client relationships."



"Implement a quarterly client check-in process to proactively strengthen relationships."

"Be more efficient in operations."



"Document and refine one internal process each month to improve efficiency."

"Increase revenue."



"Increase revenue by 15% over the next 12 months by adding two new services and expanding referral partnerships."

Each of these goals clearly defines what success looks like, includes measurable elements, and provides a structure for execution.

The Reality of Setbacks and Resistance

One of the biggest reasons goals fail is because they aren't designed to withstand setbacks, resistance, and competing priorities. The moment something becomes inconvenient or difficult, it gets pushed aside for more immediate tasks. Without a plan to adjust and refocus, goals become forgotten ambitions.

The key to breaking this cycle is to set goals that are adaptable, realistic, and built with accountability mechanisms that keep them in motion—even when challenges arise.



Structuring Goals for **ACTION!**

Effective goal-setting requires breaking down high-level business objectives into specific team and individual actions. Without this structure, goals remain abstract, making it difficult to track progress or understand how day-to-day tasks contribute to broader success.

Level 1 Business-Wide Goals

The foundation of structured goal-setting begins at the organizational level. Business-wide goals define the firm’s direction, priorities, and overarching objectives.

Role	Goal
Advisor	Increase revenue by 15%.
Operations	Improve efficiency through redefined workflows and communications.
Service	Enhance client retention and satisfaction, thus increasing advocacy and referral exposure.

Level 2 – Translating Goals into Team Objectives

Each team member within the business plays a role in making high-level goals a reality. Each team must determine what actions they need to take.

Role	Goal
Advisor	Increase prospecting, deepen client relationships, and enhance financial planning strategies
Operations	Streamline workflows, reduce inefficiencies, and improve/document internal processes.
Service	Improve client engagement, ensure proactive communication, and elevate the client experience.

Level 3 – Breaking Goals into Individual Actions

At the individual level, each team member must understand what they personally need to do to support their team’s objectives.

Role	Goal
Advisor	Increase referral conversations by 20% over the next quarter.
Operations	Streamline one internal process per month to save time and reduce inefficiencies.
Service	Commit to proactive client check-ins every 90 days.



Aligning **PERSONAL GROWTH** with **BUSINESS OBJECTIVES**

Personal and professional growth are not just about individual success—they are about strengthening your ability to support the team and contribute to business goals. When individuals invest in their development, the entire business benefits, creating a more efficient, effective, and collaborative work environment.

Individual Growth Strengthens the Team

When a team member sets a goal to improve their leadership, communication, or technical skills, they aren't just bettering themselves—they are enhancing the effectiveness of those around them.

If a service team member hones their ability to communicate proactively, they create fewer bottlenecks and smoother workflows, benefiting both clients and colleagues.

If an advisor sharpens their delegation skills, they ensure tasks are handled more efficiently, reducing strain on both themselves and their team.

If an operations specialist improves their expertise in process automation, they save everyone time by eliminating redundancies.

By focusing on growth areas that directly impact the team, individuals don't just elevate their own performance, they make the entire business stronger.

Bridging the Gap Between Personal Development and Business Strategy

For personal development to create meaningful business impact, ask yourself:

- What skill do I need to develop to improve my contribution to the team?
- How does my personal growth align with the business' long-term goals.
- How will improving in this area make our entire team more efficient?

For example, if a business goal is to enhance collaboration among team members, an individual on the team might focus on improving direct communication or streamlining the way client updates are shared. If the business is working toward scaling operations, a team member might set a goal to improve their ability to manage multiple client workflows efficiently or develop skills in time management and prioritization to handle increased demand without sacrificing service quality.

THE TREKCAST

After this episode, you'll start building those goals! So, start taking some notes on what you'd like to possibly tackle!



Key Takeaways

Investing in personal growth supports the team's success.

Individual development goals should align with business priorities to create lasting impact.

Strengthening leadership, communication, and efficiency makes the entire business more effective.



CASE STUDY

Setting Goals to Save Retention

The David and Lisa, owners of Skyview Financial Group, realized that client retention was slipping. While they consistently gained new clients, they weren't retaining as many as they expected, affecting their long-term growth. Recognizing that better client engagement would lead to stronger relationships and more referrals, they set a business-wide goal to increase retention while also improving operational efficiency to create a more seamless experience.



Before breaking down their plan into specific actions, they first identified the core issues affecting retention. They realized that some clients felt disconnected after their initial engagement, while internal inefficiencies made it difficult to provide proactive service. By addressing these gaps, the firm aimed to create a more seamless, high-touch experience that would not only retain clients but also strengthen relationships for long-term success.

Role	Team-Level Goal	Individual Goal
Advisors	Conduct proactive non-financial client check-ins every 6 months, ensuring personalized engagement to strengthen relationships.	Listen to 4 podcasts and read 5 articles on active listening, setting intention to use skills and tools learned.
Service	Refine client touchpoints so they are more consistent and provide relevant and value-driven messaging.	Conduct mini-survey with each call, ask each client 3 questions to gather and record insight about their questions and concerns regarding servicing and outreach.
Operations	Streamline financial review workflow to reduce inefficiencies	Enroll in development course on ops efficiencies, and demo 1-3 automation tools to support.

The Result

By aligning business-wide, team-level, and individual goals, Skyview saw an increase in client retention, exceeded their original goal, and significantly improved workflow efficiency, allowing the firm to spend more time where it mattered most: client relationships and business growth.

Skyview saw an increase in client retention with little impact to the team.

Key Takeaways

Execution is about structured, measurable actions- broad goals without defined steps don't lead to results.

Breaking goals down into smaller, team-driven objectives creates accountability and clear direction.

Tracking progress allows businesses to refine their approach and make real-time adjustments.