**Client Name Here**

Month, XX, 20XX

Number of Locations:

# **Vision & Goals Worksheet**

Use this worksheet to document your vision and start setting measurable goals to plan for success.  Be sure to send in your completed form to your CSM at PERQ so we can help you achieve success!

1. **Define Your** **Vision Statement:** This should be personal to you and motivate your team.

*Example: “Treat Every ‘Digital Up’ as the Same Opportunity as an In-Store Up.”*

1. **Initial Goals:** What are you aiming to accomplish in your first 90 days regarding your digital sales strategy? We got it started for you!

✓ Getting your team accountability & follow-up process in place

✓ Getting conversations started

✓

✓

✓

1. **Definition of Success after 90 days:** Once you have played the game for 90 days, what will success look like to keep you going with PERQ? These should be measurable goals so we know if we missed the mark!

*Examples: Lead to Sale Conversion %, Influenced Revenue $, Increased Time on Site, Visitor to Lead Conversion %*



1. **Anything else you need PERQ to know?**