

kick
side

Business Planning & Goal Setting

Helping you plan with clarity,
focus, and accountability



www.skca.co.nz

Here to help you plan

Every business journey looks different, but having a clear plan makes the path easier to navigate. This information is intended to help you clarify your thinking, set financial goals that support your vision, and turn them into practical actions.

Used alongside our advisory support and quarterly meetings, it will help you stay focused, accountable, and moving forward.



Set financial goals for your business

Why financial goals matter

A business without goals is a business without direction. Financial goals help you understand what success looks like, guide your decision making, and keep your energy focused on what truly moves the needle. They also give you clarity during uncertainty, helping you stay grounded in your long-term direction rather than reacting to whatever pops up next.

Turning big ideas into practical targets

Setting financial goals is more than choosing numbers. It starts with understanding your wider vision, then identifying the milestones that lead you there. When you connect your goals to what you value and where you're heading, they become more motivating and far easier to action. SMART goals give you a simple structure to ensure your targets are specific, measurable and realistic.

Staying proactive, not reactive

Clear goals help you stay ahead of the game. They allow you to spot trends early, adjust quickly, and make decisions based on intent rather than instinct. With well-set goals, cashflow becomes more predictable, priorities become easier to manage, and you get visibility over what is working and what needs attention. This proactive approach is what keeps businesses stable during quieter seasons and scalable during growth.

Bringing your team and advisors on the journey

Good goals don't just guide you; they align the people around you. When your team and advisors understand what you are working toward, everyone can pull in the same direction. Your resources get used more effectively, conversations become clearer, and progress becomes easier to measure. Whether your aim is growth, efficiency, profitability or improved stability, shared goals create shared momentum.

Get S.M.A.R.T with your goals.

Your goals should be...

S

SPECIFIC

Plan effectively, with specific targets in mind

M

MEASURABLE

Track your progress and reevaluate along the way

A

ATTAINABLE

Set realistic goals that are challenging, but achievable

R

RELEVANT

Ensure the goal serves as a relevant purpose

T

TIMELY

Specify a deadline, monitor progress and reevaluate

Schedule quarterly meetings with your Sidekick

Building a business can feel big, especially when you're juggling day-to-day demands alongside long-term goals. Quarterly meetings create space to step out of the noise, take stock of where things are at, and make considered decisions about what comes next.

They're not about judgment or ticking boxes. They're about momentum. Ninety days is the ideal rhythm to reflect on progress, adjust direction if needed, and set clear priorities for the next quarter.

What quarterly meetings give you

- Dedicated time to focus on your business, not just work in it
- Clear checkpoints to review progress against goals
- Earlier visibility of risks, opportunities, and pressure points
- Better decision making backed by up-to-date financial insight
- Ongoing accountability without feeling overwhelming

We're here to help you

- Translate big-picture ideas into practical, achievable targets
- Understand the financial story behind your numbers
- Use the right tools and tech to stay organised and informed
- Hold space for honest conversations about what's working and what's not
- Keep goals aligned to your vision and values

Why quarterly works

- 90 days is long enough to make meaningful progress, short enough to stay focused
- You can respond quickly to change rather than waiting for year end
- Small, consistent improvements compound over time
- Regular check-ins reduce surprises and build confidence

How to prepare

A little preparation goes a long way. Before each meeting, bring:

- Updated numbers or reports from Xero
- Notes on what worked well and what felt challenging
- Any roadblocks you'd like help untangling
- Your draft goals or priorities for the next 90 days

Our advisory approach

You run the business. We're here to guide, question, and support your thinking. Together, we look ahead, identify opportunities early, and make sure your goals stay grounded in what matters most to you. It's people focused accounting at its best – practical insight, real conversations, and a partnership that grows with your business.

The quarterly rhythm

REVIEW

Look back at the last 90 days. What worked, what didn't, and what surprised you. This is about learning, not judgement.

REFOCUS

Revisit your goals and priorities. Make sure they still align with where your business is heading and adjust if things have shifted.

PLAN

Decide what matters most for the next quarter. Set clear, achievable goals and agree on the actions that will move you forward.

ACT

Put the plan into motion. Focus on progress over perfection, knowing you'll review and refine again at the next check-in.

From planning to action

Clear goals and good conversations are only valuable if they lead to action. The real work happens between meetings, where priorities are tested, decisions are made, and progress starts to show.

Our planning tools, including the Business Plan and 90 Day Sprint, are designed to support this stage. They help you focus on what matters most, create structure around your priorities, and keep momentum going quarter by quarter.

Create a business plan

A business plan gives you a clear reference point for decision making. It brings together what matters most right now – your priorities, financial targets, and key challenges – and helps keep your thinking aligned with where your business is heading.

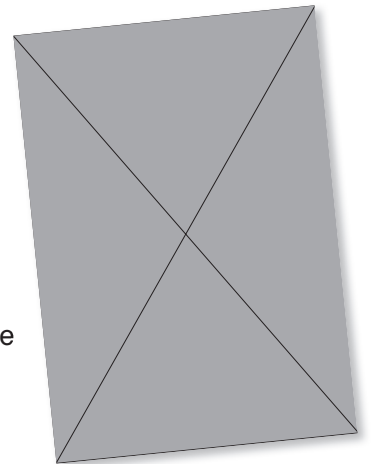
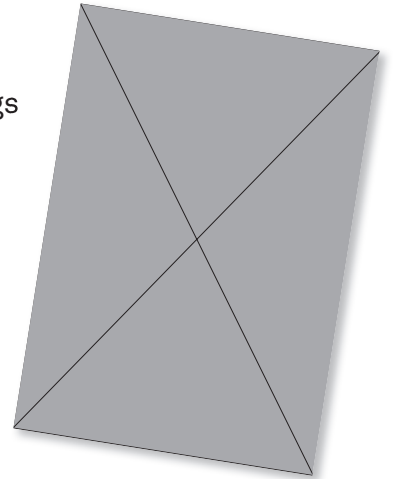
This isn't a one-off exercise. Use your business plan as a working document throughout the year. Revisit it as things change, refine it as you gain clarity, and use it to guide conversations and decisions in your quarterly meetings. The value comes from clarity and consistency, not from having every box perfectly filled in.

Embrace a 90 day sprint

A 90 Day Sprint is about action. While your business plan sets overall direction, the sprint narrows your focus to what matters most right now.

By choosing up to three priorities for the next quarter, you create a clear, achievable window for progress. Each sprint helps you break bigger goals into practical steps, assign responsibility, and set timeframes that keep momentum moving.

Used consistently, 90 Day Sprints create rhythm and accountability. They make progress visible, support better quarterly conversations, and help you adjust quickly as priorities or conditions change.

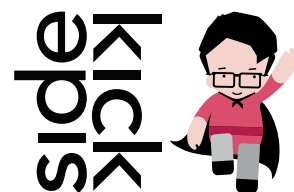


Planning is better with a Sidekick

Clear goals and good plans work best when they're revisited and supported. Reviewing your Business Plan and 90 Day Sprint in regular quarterly meetings helps keep priorities clear, decisions grounded, and progress on track.

If you're ready to book your next quarterly meeting, want support working through your plan, or just want to talk it through, reach out to your Sidekick team, we're here for you.

Business plan



For the year ending: _____

PURPOSE

VISION

WHAT WE WANT TO ACHIEVE

VALUES

BUDGET	ANNUAL	YTD – Q1	YTD – Q2	YTD – Q4	YTD – Q4
Gross Revenue Target					
Gross Profit					
Gross Profit %					
Overheads					
Net Profit					

KEY PERFORMANCE INDICATORS

OUR IDEAL CLIENT

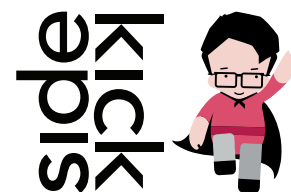
OUR VALUE PROPOSITION

OPPORTUNITIES

VULNERABILITIES

OUR MOST CRITICAL CHALLENGE

90 Day Sprint



A 90 Day Sprint helps you turn plans into action. By focusing on the next quarter, you can prioritise what matters most right now and avoid spreading your energy too thin.

Choose up to three goals that will make the biggest difference to your business over the next 90 days. Keep them closely linked to your wider vision so every action supports where you're heading.

For each goal, note why it matters, how you'll measure success, and the key actions required to achieve it. This keeps your focus clear and your progress visible.

Goal #1	Goal #2	Goal #3
Why	Why	Why
Actions to achieve the goal	Actions to achieve the goal	Actions to achieve the goal
What: _____	What: _____	What: _____
Who: _____	Who: _____	Who: _____
When: _____	When: _____	When: _____
What: _____	What: _____	What: _____
Who: _____	Who: _____	Who: _____
When: _____	When: _____	When: _____
What: _____	What: _____	What: _____
Who: _____	Who: _____	Who: _____
When: _____	When: _____	When: _____

Revisit this sprint regularly to stay focused and accountable. It provides a clear snapshot of progress and makes reviewing the quarter and setting the next one up simpler and more effective.