

# Goal-Setting Workbook

## Step 1: Start with Reflection

When we're setting goals, it's important that we start with reflection. For this section of the worksheet, fill in your answers to the following questions

What were the top five things that happened over the past year that you're most grateful for?

What five people are you most grateful for this year, and why?

What three accomplishments in the last year are you most proud of?

## Step 2: Set Your Vision

In this step, you're going to paint a picture of what you want your life and business to look like. This is necessary for setting meaningful goals. Answer the following questions:

What are your 3-5 most important values?

What 5-10 things must happen over your lifetime for your life to feel "Complete?"

Describe where you want to be in 10 years. It can sometimes help to go back to your balance wheel and describe your vision in each area.

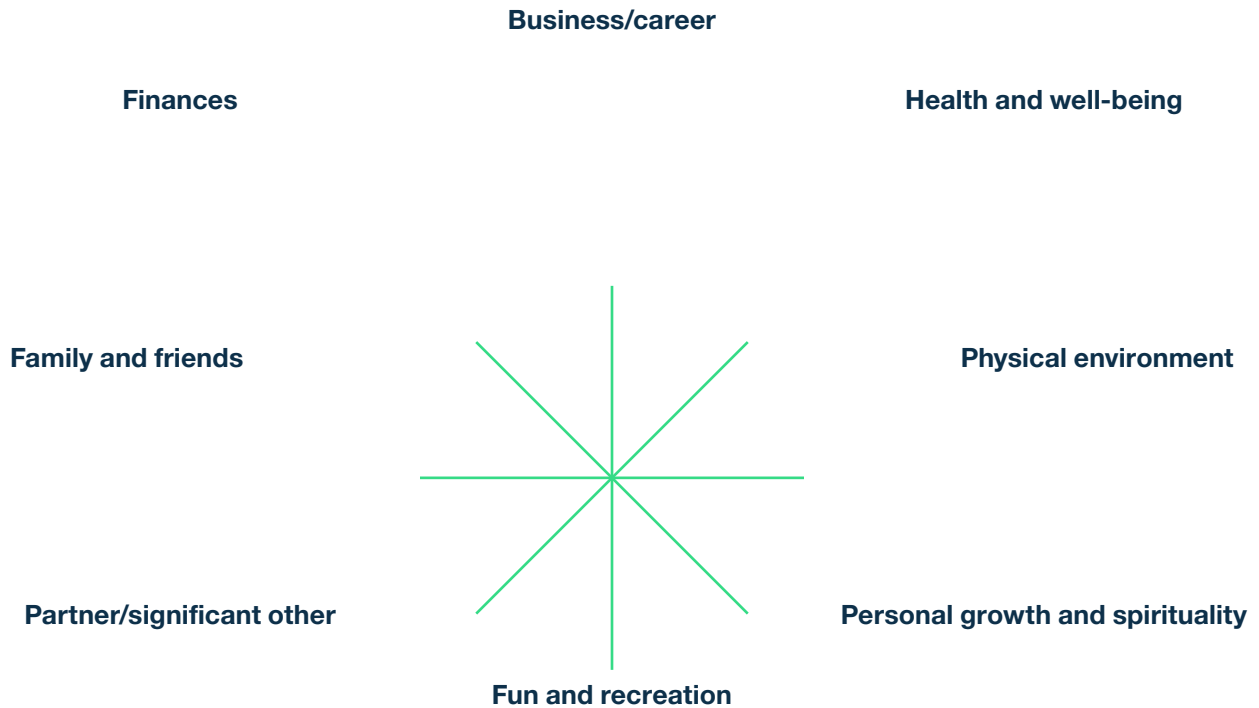
### Step 3: Set Goals in Life and Business

It's important to have goals in each area so we don't ignore areas of our life that are important to us. Ask yourself: What do I need to do in the next 12 months to get me closer to my vision?

Write these goals in the spaces below. [Research from Dominican University](#) found that people who write down their goals are more likely to achieve those goals than people who don't.

First, you're going to look at your balance wheel, in which each "spoke" represents a different area of your life. In this exercise, we're going to write down our top 3-5 goals in each area using the **SMAC goal format**, which is:

- Specific** – the goal must be clear and defined.
- Measurable** – what does "done" look like and by when?
- Achievable** – within the capabilities of the team.
- Compatible** – aligned with your mission, vision and value.



### **Business/Vocation**

What are your top 3-5 goals in this area of your life:

### **Physical Health**

What are your top 3-5 goals in this area of your life:

### **Mental/Emotional Health**

What are your top 3-5 goals in this area of your life:

### **Play/Leisure**

What are your top 3-5 goals in this area of your life:

### **Family**

What are your top 3-5 goals in this area of your life:

### **Spirituality**

What are your top 3-5 goals in this area of your life:

### **Community Service**

What are your top 3-5 goals in this area of your life:

### **Friends/Social**

What are your top 3-5 goals in this area of your life:

### **Financial**

What are your top 3-5 goals in this area of your life:

### **Education**

What are your top 3-5 goals in this area of your life:

## Home/Environment

What are your top 3-5 goals in this area of your life:

## Rank Those Goals

From the above list, choose your top 10 goals for the year:

## Step 4: Break Up Goals into Action Items

You can't achieve your goals without action. That's what we're doing in this step. Choose the top three goals from your ranked list above. Instead of thinking of it as one huge goal to accomplish, let's break it down into the top three actions you can take to achieve each goal. Then add a deadline to each action item.

### Goal #1

Action Item #1 by

Action Item #2 by

Action Item #3 by

### Goal #2

Action Item #1 by

Action Item #2 by

Action Item #3 by

### Goal #3

Action Item #1 by

Action Item #2 by

Action Item #3 by