



MASTERING GOAL SETTING

PURPOSE AND OBJECTIVE:

Goals give you long-term vision and short-term motivation.

Writing goals is like planning an expedition to Mount Everest. You think about **where** you specifically want to go (the peak), **what** it will look like when you get there (reach the peak), **what** resources you need to get there (support from others, time, money), **how** you will get there (milestones) and **when** you want to reach your destination. For a goal to be successful, you need to **write it down** and **tell others** so they can support you and hold you accountable.

It's the same with establishing business goals:

- Focus on what's most important to the company, department, team and yourself.
- Align your individual goals with department goals and strategic priorities.
- Prioritize efforts and resources on critical projects and initiatives.
- Create an inclusive culture by involving others.

Every individual contributes to the company's overall priorities and initiatives. Think about:

What will be done?

- Goals are aligned with company / function priorities and initiatives, department goals, and individual role and responsibilities.

How will it be done?

- What competencies, skills, knowledge, strengths and values will be utilized?

Why do we do it?

- What business and performance results and measures will be met or exceeded?

Why setting goals?

- ✓ Identifies what you truly want.
- ✓ Propels you forward by pushing you out of your comfort zone.
- ✓ Keeps you focused.
- ✓ Helps you set boundaries.
- ✓ Helps you live life to the fullest.
- ✓ Helps you transform big problems into small obstacles.
- ✓ Helps you make decisions.
- ✓ Clarifies expectations and holds you accountable.
- ✓ Enables you to celebrate achievements.
- ✓ Helps you unlock your full potential.





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EXERCISES

Below exercises and tools can help you clarify where you want to be. This preparation will help you in setting the right goals.

Visualization

Begin with the end in mind: to be able to achieve something, you need to visualize what the future looks like first.

Complete this exercise to visualize the desired future.

- **Find a quiet space** and take 30 minutes to visualize where you see yourself in xx year(s).
- **Create a vivid mental image** by answering the following questions:
 - Where are you?
 - Who are you with?
 - What are you doing in your personal and private life?
 - What do you see, hear, and smell?
 - How are you feeling?
- **Write it down.** Then share it with your coach who can help you create a plan and make it happen.

Complete this exercise to visualize a perfect day in your life.

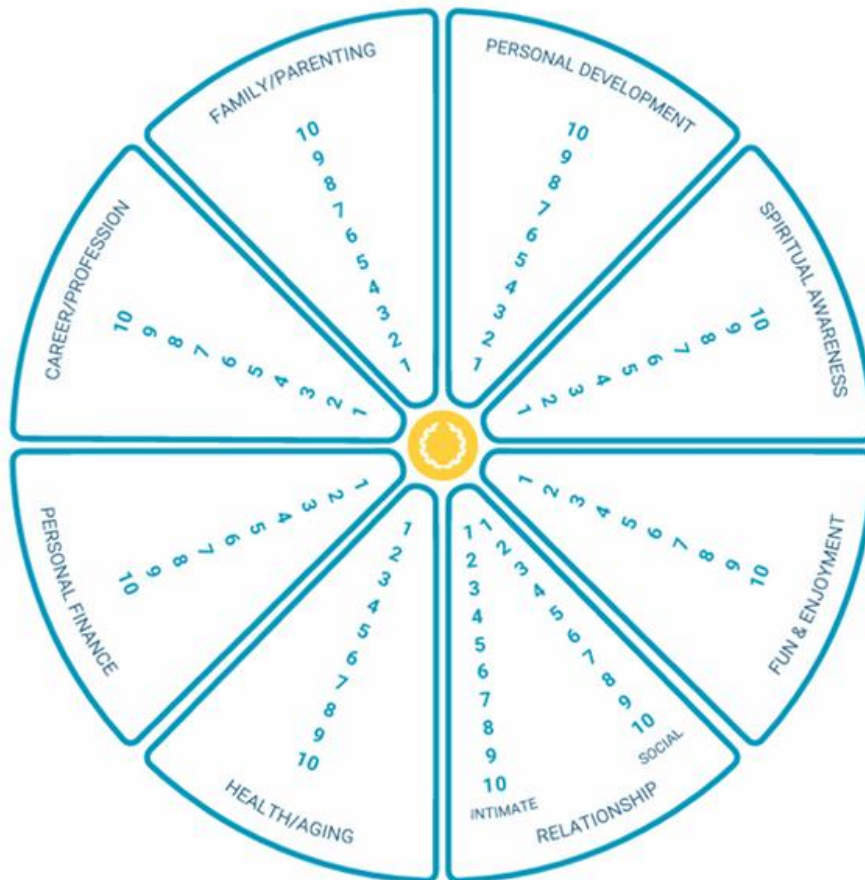
- **Find a quiet space** and take 10 minutes to visualize your perfect day.
- **Answer these questions:**
 - What do you do from the moment you wake up to the time you go to bed?
 - How do you feel throughout the day?
- **Write it down.** Then share it with your coach who can help you create a plan and make it happen.



Wheel of Life

How satisfied are you with your life?

For each section of the wheel, circle the number that represents your current level of satisfaction. The higher the number, the more satisfied you are in that area.



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Consider:

- Why did you give it that rating?
- Where do you want to be in xx months?
- What do you need to stop, start, or continue doing to get there?

Share it with your coach who can help you create a plan to improve your satisfaction in a specific area.

Note: email Karin@DunamisC.com if you are interested in other wheels (career, health, leadership, personal development, relationship).





GOAL SETTING

Create a list of everything you think you want to do / achieve this year.

What do I want to own?	Who do I want to be?	What do I want to do?
Pay off my car loan.	Be the SME – Subject Matter Expert and trusted advisor to my colleagues.	Participate in a leadership program.
Lead a new project at work.	Improve my well-being.	Go on vacation with my friends.
	Be more confident when presenting.	Learn to play pickleball.

Tips:

- Think about what you really want to achieve.
- Consider the reasons you're selecting it.
- Choose a goal that is a journey.
- Make sure your goal excites you.
- Performance vs outcome goals.





Make your Goals SMART

Benefits of writing meaningful and achievable goals by following the SMART formula.

- Involving others and getting buy-in.
- Sharing and clarifying information, policies, processes, etc.
- Making decisions together.
- Receiving feedback.
- Achieving team and company goals.
- Consistent messaging.
- Holding others accountable.
- Brainstorming new ideas / solutions.
- Overcoming challenges and solving problems.
- Building trust and relationships.
- Inspiring and motivating others.
- Strategic thinking and planning.

	Description	Ask yourself	Examples
Specific	<p>Anyone who reads the goal should be able to understand what exactly you want to accomplish.</p> <p>A specific goal answer the What - Why – Who - Where - When - How (By how much? How many? How well?)</p>	<p>“What exactly do I want to accomplish?”</p>	<ol style="list-style-type: none"> 1. I improved my well-being: nutrition, exercise, work/life integration 2. Processing time 3. Order mistakes
Measurable	<p>If your goal isn't measurable, there will be no way to know if you're making progress.</p> <p>Goals include numbers like cost, ratio, percentage, spend, etc.</p> <p>Have the end in mind, e.g. desired result (not necessarily the actions on how you will get there)</p>	<p>“How will I know when I've reached this goal?”</p> <p>“Where am I now and how much do I want to improve?”</p> <p>“What does it look like if I meet – exceed the goal?”</p>	<ol style="list-style-type: none"> 1. On a scale of 1 to 10, 1 being low and 10 being high. I finish work at 6pm. 2. From xx to xx hours 3. By xx%
Achievable/ Attainable/ Actionable	<p>Your goal must be something that you can realistically attain.</p> <p>It is a stretch goal <u>and</u> still possible to achieve.</p>	<p>“Can I achieve this aspirational goal with effort, commitment, and needed resources?”</p>	<ol style="list-style-type: none"> 1. ...from a rating of 3 to 7 2. from 5 to 4 hours 3. Reduce order mistakes by 10%



	Description	Ask yourself	Examples
Relevant/ Realistic	<p>Tie your goals to your purpose and deeper values to give them more meaning. Commit to it 100% so you stay motivated to achieve it.</p> <p>Ensure it is realistic and relevant to your specific role and responsibilities, as well as linked to vision, your team goals, growth, skills and/or competencies.</p>	<p>“What makes this goal significant to my professional or personal life?”</p>	<ol style="list-style-type: none"> 1. I support my partner with preparing dinner and helping with putting the kids to bed 3 times a week. 2. focus on a new project. 3. Enhance customer satisfaction / order processing rating of 9.
Timely Time-bound	<p>Include a completion date and milestones to get there.</p> <p>Putting down a deadline helps you being committed and focused on getting it done.</p>	<p>“When will I achieve this goal?”</p>	<ol style="list-style-type: none"> 1. 3 times a week (Mon, Wed, Fri) starting in two weeks. 2. By the end of this quarter. 3. By the end of the year.

Tips:

- Use descriptive language: what will you see or hear when you you’ve met your goal?
- Use action words (I achieved, I improved, I enhanced, I completed, I created, I am).
- Use positive language to motivate yourself (use ‘opportunities’ instead of ‘problems’, ‘hurdle’ instead of ‘obstacle’)
- Keep it clear and concise.
- Keep your core values in mind.
- Write them in a way that there is only one meaning to it.
- Include the impact on others: customers, team, family, etc.



Plan your way towards achieving your goals:

- Align your goals (partner, team, stakeholders).
- Break them down into manageable chunks.
- Make an actionable plan to achieve them.
- Set milestones and checkpoints (daily, weekly, monthly, quarterly).
- Share your goals to be held accountable (partner, colleague, stakeholder, coach, etc.)
- Add stakes (relationships, well-being, feeling satisfied, etc.)
- Celebrate achievements.
- If a goal doesn't work – change it.

Ask yourself the below questions to be clear about where you are, where you want to be, and how exactly you will get there:

- ✓ Is this what I truly want?
- ✓ *Where am I right now?*
- ✓ *What is my personal and team contribution?*
- ✓ *What are my passions, talents, strengths and development opportunities?*
- ✓ *What challenges and issues, which are in my 'zone of influence', could I turn into goals?*
- ✓ *Where do I want to be in 90 days / 1 year?*
- ✓ *What will success look like?*
- ✓ *Which performance measures will I incorporate to check if I'm meeting / exceeding expectations?*
- ✓ *Which company and business priorities should I align my goals to?*
- ✓ *Which values are my goals aligned to?*
- ✓ *How will I get there?*
- ✓ *How will I stay on track? What are my milestones and deadlines?*
- ✓ *Who do I need to share my goals with so they can support me?*

'If you fail to prepare, you prepare to fail.'





CHECKLIST

Use this checklist to reflect after writing your goals or when providing feedback to someone else. Write down your observations and provide positive and constructive feedback.

	Yes	No	Feedback
Is the goal specific enough?			
Can I measure the goal and track progress?			
Is the goal achievable/attainable with what's going on internally and externally?			
Is the goal relevant to my vision, my life, my role, etc.?			
Do I have a start and/or deadline, timeframe, etc.?			
Am I planning to share my goals with key stakeholders?			

What is the minimum I can do?	
What is the maximum I can do?	
What is the middle I can do?	





FREQUENTLY ASKED QUESTIONS

Q: What is goal setting?

Goal setting is the process of identifying something you want to achieve and creating a plan to reach it. It involves clarifying your objectives and determining the steps needed to make progress and eventually reach your desired outcome.

Q: Why is goal setting important?

Goal setting provides direction, focus, and motivation. It helps you prioritize your time and resources, stay committed, track progress, and achieve both short-term and long-term objectives. It also gives a sense of purpose and helps you measure success.

Q: When should I write goals?

Set goals at the beginning of a new chapter in your life and at the beginning of each year.

Q: How do I stay motivated to achieve my goals?

- Break down large goals into smaller, manageable tasks.
- Celebrate small wins to maintain momentum.
- Remind yourself regularly of why the goal matters.
- Stay flexible and adjust if needed but keep the end goal in sight.
- Find an accountability partner or share your goal with others for support.

Q: Can I set multiple goals at once?

Yes, you can set multiple goals, but it's important to prioritize them based on urgency, importance, and resources. Focus on a few goals at a time to prevent overwhelm. Ensure you don't spread yourself too thin, and balance work on each goal to make consistent progress.

Q: How do I track my progress?

Tracking progress can be done through a journal, planner, or digital tools. Set milestones or checkpoints to review your progress regularly (monthly, quarterly, mid-project). Reflect on what's working and adjust where necessary.

Q: How do I overcome hurdles while working on my goals?

Break down the problem into smaller parts, seek advice from others, and stay focused on the bigger picture. Use setbacks as learning opportunities and adjust your plan or mindset to keep moving forward.

Q: Is it okay to change my goals?

It's okay to change your goals if your priorities shift or if you realize that a goal no longer serves your vision or values. Goal setting is a dynamic process, and adapting your goals as you grow is a healthy part of personal development.





APPLY WHAT YOU'VE LEARNED

- What are you going to stop doing?
- What are you going to start doing?
- What are you going to continue doing?



Stop	Start	Continue

Accountability Partner:

Follow-up:

