Goal-Setting Kit

A Step-by-Step Guide to Creating Your Master Plan

Coach Andrea

Success-discovery for business owners & executives

Would you like to greatly improve your ability to achieve your goals?

Are you ready to get some perspective on what you have accomplished and clarify what you want to do next?

Would you like to be more intentional about where you and your business are headed?

If so, this Goal-Setting Kit is for you. Take some time – a day, a week - to work through the five steps and set more than a list of goals… set an *intention* for what you want to accomplish next.

How do you *want* to spend the next year, or the next quarter?

How do you *not want* to spend it?

You can be the master of your destiny.

Make those decisions now and get yourself on track!

So - are you ready to get started on your master plan? Let's go!

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Now What?

PREPARE
Create Your Space

First, create a quiet, thoughtful space *within* you: Grab a rejuvenating drink of water. Consider taking a short, quiet walk to relax a bit and get your thoughts flowing.

Then, create a quiet, thoughtful space *around* you: Find a spot in your home where you can be creative, intuitive and inspired. Maybe put on some relaxing music or light a candle.

And begin…

STEP 1
Acknowledge Now

Start by acknowledging all that you have already accomplished.

Pause for just a moment and think about it. You've come a long way to get to where you are now. It is important to recognize this fact because what you've accomplished thus far will be the basis for where you choose to go from here. That is the foundation on which you will be building.

"Acknowledging Now" is a key step in the goal-setting process to get the good feelings flowing, so take your time before moving on to the next step.

STEP 2
Look Back

To help with your goal setting process, look back at your life both professionally and personally, and draw from what you've learned.

Use the Accomplishments Worksheet on the next page or the separate PowerPoint version that came with this kit to capture your answers to these key questions:

- What worked well for you?
- What didn't work well – and why?
- What surprised you?
- Who or what disappointed you?
- Who or what delighted you?

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ACCOMPLISHMENTS WORKSHEET

LIST YOUR 10 MOST RECENT ACCOMPLISHMENTS
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

REPORT CARD

List 3 Recent Highlights
1.
2.
3.

Rate yourself in the following 4 areas:	
AREA	**A B C D F**
Willingness to change & grow	
How well I applied myself to get what I most wanted	
How well I listened to, trusted, and responded to my intuition	
How well I accomplished what I set out to do	

STEP 3
Look Forward

Looking forward, think about what you want to do – specifically. Consider these questions:

- What do you want more of in your life?
- What do you want less of in your life?

- Who do you want to spend more time with?
- Who do you want to spend less time with?

- What are the most important things you want to accomplish?
- What do you need to learn to accomplish these things?

- What contribution do you want to make?
- How much do you want to earn, save, and invest?

- What will you do for fun?
- What will you do to optimize your health?

- What is your single *most important* goal?

STEP 4
Sketch Out Your Goals

Use the Goal-Setting Worksheet on the next page or the separate MS Word version that came with this kit to capture your top 10 specific goals for the next year or quarter.

This is just a sketch, not your final list, so open your mind to ALL the possibilities. What do you truly want to accomplish? To quote Robert H. Schuller, *what would you do if you knew you would not fail?*

Start each goal with "I am" or “I will."

Take some time to create this first draft. It may take two minutes, or two hours or even two weeks…

Remember: You are building what you want in your work and life. It is worth a moment’s attention!

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GOAL-SETTING WORKSHEET

Year / Quarter:		
Theme for Goals:		
Fundamental Change to Make:		
Amount to Earn and Save:	*Earn:*	*Save:*
Ultimate Reward for Reaching Goals:		

10 SPECIFIC GOALS:	**STARTING IN MONTH / WEEK***											
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**
1.												
2.												
3.												
4.												
5.												
6.												
7.												
8.												
9.												
10.												

**Set goals across either 12 months (1 year) or 12 weeks (1 quarter)*

STEP 5
Confirm Your Goals

You have stopped for a moment to be in the now, taken some time to consider your past, and then looked towards the horizon. With all of that in mind, it is time to confirm what you would like your next year or quarter to look like.

Take another look at the goals you sketched out in Step 4:

- First, make any changes that you would like. It's your list!
- *Are any of your goals vague?* Try to make them more specific. Can you identify start or end dates? If you want "more" or "less" of something, can you quantify *how many* more or less?
- *Are any of your goals unreasonable or impossible?* While idealism is a key part of your first sketch in Step 4, it is necessary here in Step 5 to bring in a small dose of reality. If a goal seems too far-reaching, consider qualifying it a bit.
- *How do you feel about each item on your list?* Your list of goals is meant to guide you towards a possibility of hope and growth. If you feel negative about anything on the list, consider going back and reworking it.
- *Have you set enough goals for yourself, or perhaps too many?* The Goal Plan Worksheet gives you room to set up to 10 goals, but you don't have to fill every line. However, it is good to have at least three.

Now What?

Set a date to review your goals.

You'll get the most out of your goals if you review them periodically. If you've set goals for the next year, set a date to review them quarterly. For quarterly goals, review them at the end of each month.

While reviewing your goals, ask yourself these questions:

- Are you on track?
- What progress have you made?
- Have any of your goals changed?

Keep an eye out for follow-up emails from Coach Andrea throughout the coming year, asking questions just like these. Use them as a trigger to remind you to check in and review your goals on a regular basis.

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Andrea Novakowski, MBA, MCC is an executive coach who has helped clients align professional goals with personal values since 1997. She guides CEOs, industry leaders, and business owners from strategic vision to measurable action plans, and works with high-potential employees who want to optimize their careers.

By tapping into Andrea's knowledge, tools and skill set, her clients are able to blend career development with personal growth to reach higher productivity and deeper levels of job and personal satisfaction.

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