



Goal Planner

Introduction:

Planning your goals can be a difficult task. You only have to look at all of the failed New Year's Resolutions to expect that can write down a goal and it will happen. Goal planning requires you to put intention and strategy into your anticipated outcome.

The following goal planner has been developed and iterated from best practices. Completing this goal planner will help you to clearly articulate your goal, clarify why it's important to you, identify how you will know when it's accomplished, and establish your strategy for achieving it. It's a strong way to start developing your goal. Keep in mind – this isn't some worksheet that you will fill out and forget about. It needs to be a living document that you refer to frequently. After the goal planning section, there is a section for progress notes. Keep this planner in a visible place, look at it frequently, and update the progress section on a regular basis. When you run into obstacles, add them to the obstacles section of the planner and identify your strategy to overcome it.

I hope that this planner gives you tools to help you achieve your goal! If you have any questions, don't hesitate to contact me.

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Instructions:

Use the following instructions to help you fill out the remaining pages of this goal planner.

Goal Name: Write a name for your goal. Don't spend too much time on it at first. Put something down, then revisit it again later once the rest of the information is filled out to capture a more accurate name.

Due Date: All goals should be time-based. Write down a due date for your goal. If you aren't sure what the due date should be now, write down your best guess and adjust it later. Again, this is a living document.

Vision Statement: Describe the goal as if it has already happened. I like to tell my clients to imagine they are in the future, and they have completed their goal. I ask them to describe the achievement of their goal. What does it look like? What does it feel like? How has it impacted your life? What type of person are you now that you've achieved this goal?

Purpose Statement: Knowing why a goal is important to you is critical to your success. Your goal has to be more important than the distractions that you will encounter on the way to completing it. When push comes to shove, your purpose statement should remind you why this goal is important to you and how it fits into your larger goals and purposes for life. If you can't articulate this, you may want to consider whether the goal is important enough to you.

Success Measures: Management guru Peter Drucker once said "what gets measured, gets managed." The fact is, if you are measuring the achievement of your goal – you are more likely going to achieve it. If your goal name and due date doesn't completely measure the progress of your goal, consider incorporating measures that will define your success. You can also use success measures to track milestones that you'll complete on your way to accomplishing your goal.

Strategy: Author James Clear uses a metaphor called "Rudders and Oars." In the metaphor, he compares a goal to a rowboat. Your goals are like the rudder of your boat. The goal steers you toward your desired outcome. But your goal doesn't progress to its end on its own. You need something that will propel you forward – you need oars. Your strategy is oars of your rowboat. Identify the behaviors, actions, and steps you will take to accomplish your goal. Make sure to include steps for how you review your progress while pursuing your goal.

Obstacles: The poet Robert Burns says it best; "The best laid plans of mice and men often go awry." No matter how carefully you plan your goal, obstacles will appear. When encountering obstacles, you have to push past the feeling of frustration and identify a strategy to overcome the obstacle. On the goal sheet, proactively identify obstacles you think might come up and identify a strategy to either mitigate the chances of the obstacle showing up or how you will resolve it if it appears.

Goal Name		Due:	
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Vision Statement: Describe the goal as if it's already happened.

Purpose Statement: Describe why this goal is important to you.

Success Measures: How will you measure success?

Measure	Goal Measure	Actual Measure

Strategy: What is your strategy for achieving your goal?

Obstacles: Identify the obstacles that could occur and your strategy for mitigating them or addressing them if they occur.

Obstacle:	Strategy:

Goal Implementation:

If you've made it this far, you must have a good start on your goals. If so, congratulations! Having a carefully planned goal is critical for success. But remember, your work isn't done yet. To increase the chances of achieving your goal, you will need to focus on your goal daily. Here are some best practices to help you stay on top of your goal.

Break it down: Break your goal down into smaller milestones, projects, or tasks. If your goal is supposed to span the entire year, identify smaller monthly goals. If your goal is made up of many different steps or stages, break it down into phases or groups of tasks. The more you can break your goal down into smaller steps, the more you will be able to see progress, which will in turn help you stay motivated.

The Four Laws of Behavior Change: Atomic Habits author James Clear states that there are four laws that will make it easier to stick with new habits or behaviors. When starting a new habit, consider how you can do the following:

- **Make it Obvious:** Research shows that all habits have a cue that triggers your brain to start the behavior. In this step, you are identifying the cue that will trigger your new behavior. Make the steps or behaviors of your goal obvious by writing them down in a visible place, scheduling them into your calendar, or stacking them after habits you have already mastered.
- **Make it Attractive:** Making your habit attractive is all about creating the motivation to get you to do it. To make something more attractive, consider partnering with something you love. Maybe you listen to your favorite band whenever you exercise. Maybe you write that book you always wanted to write at your favorite coffee shop. Consider what you can implement that will make performing it actually happen.
- **Make it Easy:** As humans, we are hard-wired to conserve our energy. We like the path of least resistance; we like to hit the easy button. As you are beginning your new habit, consider how you might make it easier to implement. If your goal is to eat healthier, consider meal planning ahead of time so that you have health food available when you are hungry. If you are exercising, set your clothes out so that you can easily get into them.
- **Make it Satisfying:** We want to see immediate rewards. Unfortunately, many of the goals we pursue take time to come to fruition. We need to find ways to make pursuing these goals satisfying while pursuing them. Consider rewarding yourself for good behavior, make a habit tracker so you can see your progress. Set up ways where you can get immediate satisfaction for taking steps towards your goal, no matter how small.

Track Your Progress: Below this page, you will see a progress tracker. As we just mentioned on the previous page, tracking your progress can be a huge motivator. It can be an intrinsic reward when things are going well, and it can be an alarm when things aren't going well. Tracking your progress on a regular basis ensures that you are keeping your goal top of mind. Allocate a few minutes a week to review your goals, milestones, projects, and tasks. Then, write down a status update on the next page.

Troubleshoot Obstacles: In his book, "The Obstacle is the Way", author Ryan Holiday shares a quote from Roman Emperor and Stoic Philosopher Marcus Aurelius. "The impediment to action advances action. What stands in the way becomes the way." Instead of spending time in frustration bemoaning the obstacles that appear, focus on troubleshooting them. Identify what you believe is the root of the problem and adjust your strategy to address that obstacle. Seek advice from others, read, identify best practices, keep trying to work through the obstacle. Remember, you only fail when you give up on your goal.

