

2017 Goal Presentation Questionnaire

Personal

Check against:
Life
Love
Learn
Legacy

What are the most important personal goals you need to accomplish in 2017?	
What is required to accomplish them?	
How will you measure progress towards these goals?	
Are you willing to be accountable each month to your partner / mentor and give updates?	
How will you celebrate reaching these goals? and with whom?	

Business -Long Range Goals

What is the most important goal you must reach by 2020?	
Why is this important to you?	
Why is this important to your business?	

Business – 1Year Goal

What is <u>the</u> most important goal your company needs to accomplish in 2017 that will take you closer to achieving your 2020 goal?	
What will need to be done in order for you to accomplish this goal?	
What steps will need to be taken for you to accomplish this goal?	
What will be your biggest challenge to overcome in order to accomplish this goal and how do you intend to overcome it?	
What will each of your staff / or direct reports need to do in order to reach this goal? (N/A if sole trader)	
What will you measure to indicate progress towards accomplishing this goal? What time lines will you use?	
How will you communicate this goal to all of your employees / partner How will you keep them updated on progress?	
How will you celebrate with your employees / friends when you reach this goal?	

“Balanced Goals Exercise”

The *Balanced Goals Exercise* assumes a segmented approach to goal setting wherein the whole is the sum of the parts if a balanced life is the overall goal. The model that I use has the following defined segments:

- Career/Financial (Can be both business and personal)
- Relationships (Usually has to do with family/friends)
- Well Being (Usually has to do with physical condition)
- Spiritual (Can be almost anything that deals with spiritual/intellectual growth)
- Personal (What are you going to do for yourself?)
- Wild Card (What doesn't fit anywhere else?)

The rules are that there must be at least one goal in each category, all of the goals must be accomplished by the end of the calendar year, and the goals must conform to the "SMART" criteria, i.e.,

- Specific
- Measurable
- Achievable
- Realistic
- Time-based

Participants are encouraged to develop Key Indicators that correspond to each goal. There may be a range of performance indicators – but which is THE most important.

Check what you come up with against these four criteria (4L's) to ensure that they meet your core values. These core values are fundamental to each and every one.

- Life (what is the lifestyle you want to have?)
- Love (relationships, both personal and business?)
- Learn (Do you strive to learn new things, what new things)
- Legacy (What do you want to be written on your tombstone)

It may be useful to answer the following questions in addition to the Balanced Goals. Each question should be answered by one specific thing, ideally something not covered by the Balanced Goals.

1. What am I going to Stop doing this year?
2. What am I going to Start doing this year?
3. What am I going to Continue doing this year?

My Personal Goal Worksheet

Goal	Action Plan Outline	Complete By	Part of My Life Affected	How It Will Benefit Me

Planning versus Action

Where are you?	Don't Plan	Plan
Don't Implement Just Cruising		
Implement, Busy Busy, all activity		