

Goal Planning Worksheet

Thank you for downloading this goal planning worksheet.

This worksheet can be used for a monthly, quarterly or half yearly review. It's a quick way to examine how far you have come and set measurable goals for the coming period.

Working through this worksheet should take you about 30 minutes to an hour if you have been setting goals previously.

If you're new to setting goals, it may take a bit longer.

Print it out and write in it. Keep your notes so you can refer back to them and track how you're doing.

Remember that what doesn't get measured doesn't count. You need to be able to measure how far you have come. Set goals that are Specific, Measurable, Achievable, Relevant and Time bound.

For example: I will sign on 3 new retainer clients per month for the next 6 months.

If you are far off from achieving a goal you have set, consider if you have set impossible goals. Your goals should also be within reach. Don't set impossible goals, it will only demoralise you if you don't meet them. But don't make your goals too easy either as that then has the effect of not helping you grow.

You can set goals for your business, your career, personal and family life.

Have fun with it.

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Review:

Start Date _____ To End Date _____

How have you done on the goals you set in the period under review? List your goals and assign a score between 1 and 10 (10 being that you have achieved the goal on target) to indicate your progress on each of those goals.

| | Description | Score |
|-----------------|-------------|-------|
| Personal Goal 1 | | |
| Personal Goal 2 | | |
| Personal Goal 3 | | |
| Business Goal 1 | | |
| Business Goal 2 | | |
| Business Goal 3 | | |

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Reflection:

How have you done overall? What factors have affected your performance in the period under review. Write out 3 things you will continue to do and 3 things you need to stop doing in order to do better in the coming period.

Stop

Start

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Plan Ahead:

List 3-5 goals you would like to achieve in the next period. Too many goals will over stretch you and lead to burn out.

Tip: Identify measurable, achievable and relevant goals and set a time period for the next review.

| Goal | How will you know you have achieved it? |
|------|---|
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