

Note on the goal setting process

Three pieces were added to the goal setting process specifically for the preconference:

- ***Developing a mission, vision and values statement for your work as a professional was suggested as pre-work for the conference. This exercise in examining your professional life was intended to prepare participants for goal setting. It will not be included in the goal setting process.***
- ***The circles exercise was a device to have participants notice the difference between how important certain areas of their life are...and how much time they actually spend in these areas. It was a tool for developing a variety of “wants” in your life. But this exercise doesn’t work nearly as well if it is self-administered. It will not be included in the goal setting process.***
- ***We also added a worksheet just for work/life balance strategies because we had feedback that this was an important issue for participants. In practice, it wasn’t as important to the group as we had thought. However, we will include it in the worksheets and goal sheets as an optional part of goal setting.***

Goal-Setting

When goal-setting, people often make one or more of these missteps during the process, which undermines achieving the goal:

1. They don't really want the goal. They have been influenced by others (like their boss or a significant other) into thinking the goal was "good" for them.
2. They have chosen a goal so huge that achieving it is daunting. And so they continually miss the mark.
3. The goal is not specific, measurable or have deadlines so they are never sure when they have achieved it.
4. They never develop the incremental steps that are necessary to reach the goal.
5. No one holds them accountable for continually working towards the goal.

The following goal setting system has measures to counter these missteps.

Step One: Developing "want" lists.

This first step puts you in touch with what you really want in your life in order to create goals that you are motivated to reach. You will need the following four handouts:

- *The Categories for Developing Wants* – This sheet provides a little detail for the seven categories we will use for developing "wants". The purpose of the seven categories is to encourage you to look at all aspects of your life when you are developing "wants". You are welcome to customize this list by adding or subtracting categories to fit your lifestyle.
- *Career Wants Worksheet* – This worksheet is dedicated just to career wants, which will probably be the largest category of the seven.
- *Personal Wants Worksheet* – This worksheet covers the remaining six categories which we have labeled personal even though they may have some connection to your career. For examples, some health and fitness "wants" may be connected to having more energy at work.
- *Work/Life Balance Worksheet* – This optional worksheet can be used to list strategies for keeping a bright line between your work life and your personal life.

Step One (Cont.)

Now take some time and think about each of the categories on your worksheets: Personal, career, and work/life balance.

Let yourself want something without judgment about whether it is possible, or selfish or affordable. Just allow yourself to want. Fill in as many “wants” as you can on the worksheets.

Step Two - Deciding on your most important “wants”

After you have exhausted your “wants”, look over your lists and decide on a value from 1 to 5 for each “want” based on it’s importance to you – with 1 being the least and 5 being the most.

Take your time. Now that we are allowing for a judgment based on importance, you may want to tweak some of your “wants” to give them more importance. You may also discover that some of your “wants” have shriveled to a 1 or 2 when you really think about their importance to you. This is a worksheet, so revise as much as you like. Other “wants” may pop up as you are going through this step. Add them to the list and grade them 1-5.

Step Three – Picking a few “wants” to become goals

Next, consider all the “wants” you judged to be 4’s or 5’s. This step has as much to do with the heart as the head. Choose 1 or 2 personal “wants” and choose 1 or 2 career “wants”. Also choose a work/life balance strategy if you have a 4 or 5 on that worksheet. For your first time out, you may want to handle just one goal in each area.

In the next step, we will transform the “wants” that you have chosen into goals for the next year. So we will need to determine if each “want” is achievable in a year.

If any of the “wants” you have chosen will take longer than a year, then choose a portion of that “want” that you can accomplish in a year. For example, your want may be to get a Master of Fine Arts degree. Perhaps the part of that want that is achievable in a year is to “research graduate schools and enroll in a program that leads to an MFA.”

Step Four - Using “SMART” to transform “wants” into goals.

The next step involves the 5-page “Goals Sheets.” You will be rewording your “wants” so that they take on the characteristics of a SMART goal. “SMART” is an acronym for Specific, Measurable, Action-oriented, Realistic and Time bound. Let me explain that further:

- Specific refers to concrete language that clearly states what is to be achieved.
- Measurable means that the outcome is quantifiable so you know when you have achieved it.
- Action-oriented implies that you are taking specific actions to achieve the goal.
- Realistic is a warning to choose goals that are achievable given the limitations of your lifestyle and finances.
- Time bound is a reminder that all goals have reasonable deadlines built into them.

You may want to play with the wording of your wants on some scrap paper until your goals seem to satisfy the SMART criteria. When you think you have a goal that is clearly worded, enter it on the “Goals Sheets”. There are spaces for personal and career goals plus a work/life balance strategy if you want. At this point, just enter the goals and nothing else on the goals sheet. Each goal will start with the phrase, “I want to...”

Step Five – Developing a purpose for your goals.

You will notice that below each goal statement is another line that starts with the words, “Because I...” This is the purpose statement for your goal.

A purpose statement is intended to give more power to your striving for a goal, by connecting the goal to something that has a lot of meaning for you. Let me give you an example:

Let’s say one of your personal goals is to lose 10 pounds over the next 3 months. Perhaps the first purpose you come up is, “Because I want to fit into those expensive dress pants I bought last year.” That probably won’t get you to your goal because the purpose isn’t compelling enough.

However, if you keep thinking about it and deepening your purpose, you might get to this, “Because I want to live a long, healthy and productive life and I know that extra weight will shorten my life and increase the possibility of a debilitating disease as I age.” Now that kind of powerful purpose can help you get to your goal.

At this point complete purpose statements for all your goals.

Step Seven - Creating your actions steps

Any goal has incremental sub-goals or action steps that move you closer to the main goal. These sub-goals should also follow the SMART format of being Specific, Measurable, Action-oriented, Realistic and Time bound.

The action steps are important because they allow you to experience smaller successes on the way to your larger success. Success breeds success. Let me give you an example of action steps for the goal of losing 10 pounds in the next three months.

Goal: I want to lose 10 pounds over the next three months (starting August 1st).

Purpose Statement: Because I want to live a long, healthy and productive life and I know that extra weight will shorten my life and increase the possibility of a debilitating disease as I age.”

Action Steps:

1. By August 1st, I will quit snacking after 8PM every night.
2. By August 8th, I will plan the menus for three meals a day totaling less than 1500 calories. The plan will cover the next three months.
3. By August 8th, I will start working out at my gym for a total of an hour a day, three days a week. I will have a fitness coach design ½ hour of cardio and ½ hour of resistance training.
4. One day a week starting August 1st, I will allow myself to disregard my diet for one meal.
5. I will weigh myself on Friday each week at the gym to assure that I am on track for my three-month goal. If I have gained weight, I will lose the perk about disregarding the diet for one meal for the next week.

Go ahead and create the actions steps for all your goals.

Step Eight – Ask someone to support you in reaching your goals

This may be the most important step in the goal setting process. It is too easy to be slippery about keeping your word when you are the judge and the defendant. When someone else asks you about your progress each week, it raises the stakes and creates a powerful incentive to stay on track.

Step Eight (Cont.)

So enroll someone to be your support as you work toward your goals. This should be someone who will hold your “feet to the fire” about your action steps. Someone who will help you deepen your purpose if you are continually missing your goal. Someone who really wants you to reach your goal and is willing to hold you accountable for staying on course.

It is strongly recommended that you connect with your support partner each week. This may seem like a lot to ask of someone, but if you are both working on goals, you can provide support for each other. Page three of the goals work sheet has a space for agreements you will make with your support. Once you have put a support relationship in place you have completed all the steps of the goal setting process.

Staying on Track:

This is meant to be a yearly process, which builds on the wants and goals of the previous year. So hang on to all your worksheets. Here are some suggestions to help you stay on track during the year:

- Put you action steps into a master calendar - this will help you keep multiple goals on track.
- Connect with your goals and purpose statements each week to keep your motivation strong.
- Schedule the time needed for your action steps weekly. Don't think of this as leisure time...this is work time.
- Insist on giving and getting strong support from your support partner.

If you are continually off purpose with a goal, examine these options:

- Is the goal achievable? Maybe a smaller sub-goal is more suitable.
- Do you really want this goal? Maybe you are holding it as something you should want and on some level you are resisting being told what to do.
- Are you and your support partner conspiring to allow for low effort and mediocre results?
- Can you deepen your purpose to put more power behind going for your goal?
- Are you missing some action steps that could get you closer to your goal?
- Are you taking time to savor success with each completed action step?
- Have the circumstances of your life changed enough so that you should start over again with new want lists?

Good luck! Remember, goal setting is easy....goal getting is hard work.