Once you see Results, It becomes an Addiction

Females with Funds

SMARTS* PLAN
Collaborative Goal Planning Workbook

Name:	
Start Date:	
End Date:	It's okay if you don't have a projected end date yet, we can brainstorm together...
Goal Name:	Example: Job Promotion, New Business, Going Back to School, Weight Loss, Saving for a House, Save for a Business, Save an Emergency Fund of $10,000, Balanced Home and Work Life, Start my Retirement, etc.

Section I: Continuous Improvement Journey Brainstorm

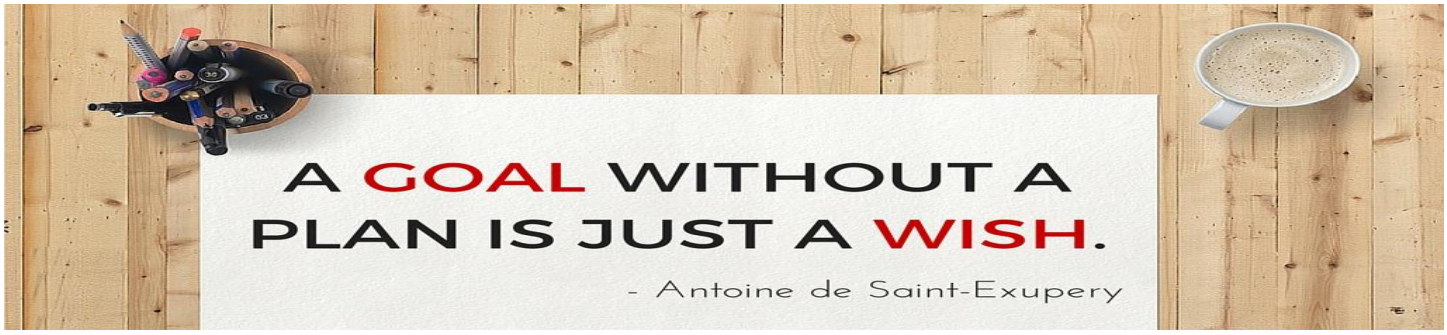
In this section, you will outline your current reality and your vision. Most of us get lost because we don't know where we are going. Documenting your goals and the process gives you a clear roadmap of how to get there.



Current Reality:

Your Journey:	Place Your Answers Here:
1. Understanding your current reality! *(Where are you in relation to accomplishing your goal?)*	Examples: I'm still researching and brainstorming. OR I'm ready to pull the trigger, I've done X,Y, and Z already.
2. Communicate Your Vision! *(If you were in an elevator with Jesus and He only had one minute to hear your vision & grant it, what would you say?)*	
3. Why do you have this goal? *(What's the purpose behind your vision?)*	
4. Plot Your Journey!	You'll do this part in Section II.
5. Get Started!	We'll do this part in Section III together.
6. Build Momentum!	We'll do this part in Section III together.
7. Yield Periodically to Reflect, Evaluate, and Make Changes as Necessary!	Section IV

Section II: Turning Your Vision Into a S.M.A.R.T.S.* PLAN



Describe your SMARTS* PLAN. In an ideal state, what would you like to happen and how are you going to get there?

S.M.A.R.T.S.* PLAN		
Specific	What exactly do you want to achieve, in as much detail as possible?	Example: I want to increase my business portfolio by purchasing two additional properties and one additional business.
Measureable	How will you know when you have reached your goal and how successful you were? Make this quantifiable. *(If it's not measurable, it may not be attainable.)*	Example: Acquire 2 rental properties and one additional business.
Attainable	List the resources and how you can obtain them. *(Don't forget time is a resource.)*	Example: I need to talk to current business owners and landlords. I need $X amount of money.
Realistic & Relevant	What change are you hoping to affect by reaching your goal. *(What outcome should result from reaching your goal?)*	Example: I hope to pass on a family business.
Time-bound	When will you complete each step? Break the overall goal into mini-steps and assign a due date to each step.	Example: Jan - March → Start researching and setting up meetings with current landlords and business owners in my field. Mar - Aug → Start saving $X amount per month to pay for these businesses.
Success Criteria	How will you identify your successes?	Example: I know I've met my goals when I have two additional properties and one additional business.
FINAL SMART PLAN	Using the answers you've provided on the left, create ONE FINAL goal that summarizes your SMARTS goal!	Example: To increase my business portfolio through a consistent process of self-exploration/evaluation, self promotion, professional learning, collaboration, and courageous conversations with business mentors, which will result in two additional property acquisitions and one business acquisition within three years.

Section III: Creating the SMARTS*Action Plan



In this section, we will convene as a working team to review your SMARTS* PLAN. Together we will brainstorm how to best reach your goals. We will work backward to set milestones with mini-goals on the "Action Plan Template" below to determine what needs to happen to reach your goals. (e.g., who are the key players, what are the various costs, etc.?). Lastly, we will create a schedule for each goal!

Action Plan

Directions: Review your SMARTS PLAN and create actions steps by breaking them into mini-goals and action steps.

SMARTS Goal:	*Example: Within five years, I will become a Managing Editor of a high fashion Magazine*

Mini Goal # 1		**Desired Achievement or Results**			**Potential Challenges**	
Mini Goal 1 - "Book the meeting with the Managing Editor in one week"						
Sequential Action Steps - Description	**Person(s) Responsible**	**Time Frame**	**Deadline**	**Resources Needed**	**Document Your Effort**	**Evaluation**

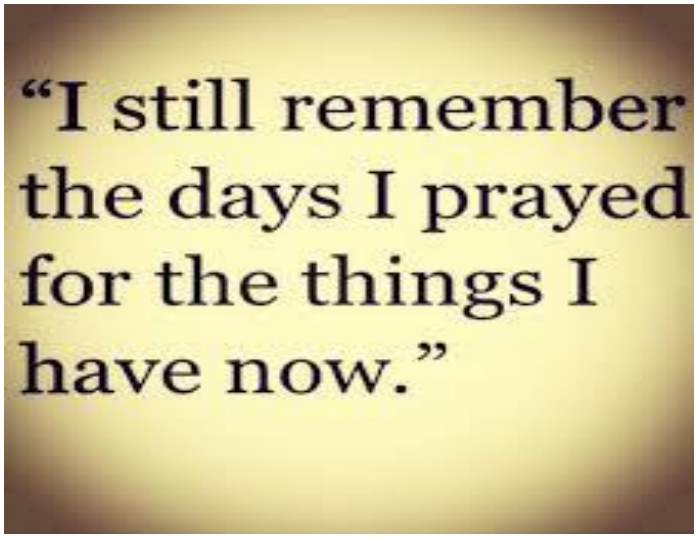
Mini Goal # 2		Desired Achievement or Results			Potential Challenges	
Mini Goal 2 - "Talk to the current managing editor to determine what skills are needed to do the job in one month."						
Sequential Action Steps - Description	**Person(s) Responsible**	**Time Frame**	**Deadline**	**Resources Needed**	**Document Your Effort**	**Evaluation**

Mini Goal # 3		Desired Achievement or Results			Potential Challenges	
Mini Goal 3 - "Go back to school and finish my journalism degree in two years"						
Sequential Action Steps - Description	**Person(s) Responsible**	**Time Frame**	**Deadline**	**Resources Needed**	**Document Your Effort**	**Evaluation**

Mini Goal # 4		Desired Achievement or Results			Potential Challenges	
Mini Goal 4 - "Volunteer for projects that the current Managing Editor is heading up within one year," etc.						
Sequential Action Steps - Description	**Person(s) Responsible**	**Time Frame**	**Deadline**	**Resources Needed**	**Document Your Effort**	**Evaluation**

Mini Goal # 5		Desired Achievement or Results			Potential Challenges	
Sequential Action Steps - Description	**Person(s) Responsible**	**Time Frame**	**Deadline**	**Resources Needed**	**Document Your Effort**	**Evaluation**

Section IV: Best Freaking Year Ever Praise Break

Letting Go of the Old	Embracing the New
	
3 Things I'm the Most Grateful For	**3 Things I Want To Get Better At**
1. 2. 3.	1. 2. 3.
2 Of My Best Memories	**2 Things I'm Looking Forward To**
1. 2.	1. 2.
1 Habit I Want To Let Go	**1 Way I Can Help Others**
1.	1.