

Goal Planner

Year: _____

Prepared by: _____





Reflect

Take 10-15 minutes and write out all the things you've accomplished in the past year, big or small. This helps us to realize that even if we didn't accomplish our original goals, we still accomplished a lot. Sometimes we get so focused on what we didn't accomplish, that we forget what we did accomplish.



My Why

Use this space to jot down your why for the year. This is like an overall summary of your vision for your life in the upcoming year. Some people have a word or phrase for the year. Others choose a Bible verse. You can come back to this any time during the year when you feel overwhelmed so you can get your focus and motivation back.

The goal is not simply for you to cross the finish line, but to see how many people you can inspire to run with you. Simon Sinek

✦✦ Tips for Goal Success

- Set deadlines, but don't set them all due at the same time
- Limit annual goals to 7-10
- Reward yourself
- Believe in yourself
- Don't be afraid to stretch yourself
- Create habits to reinforce your goals
- Know your why
- Don't be afraid of failure-failure only occurs when you don't learn from your mistakes
- Find an accountability partner
- Consider creating a vision board
- Plan/dedicate time each day to work toward your goals

A goal without a plan is only a dream.

Brian Tracy

✦✦ Goal Setting Framework

The SMARTER goal-setting framework provides a clear and structured approach to defining your goals, significantly increasing the likelihood of achieving them.

Specific-don't create generic goals-make them as specific as possible.

Measurable-quantify the results. For example: currency, time, weight, size.

Action oriented-start each goal with a verb. For example: run, build, gain, lose.

Relevant-they should line up with your overall desired lifestyle (business & personal).

Time-bound-set a time frame for how long it will take or set an ending date.

Exciting-make sure it's something you will look forward to accomplishing vs something you may dread.

Risky-don't be afraid to go outside of your comfort zone.

The distance between dreams and reality is called action.

Brian Tracy

✦✦ Prepare

Take 10-15 minutes to do a brain dump of every idea/goal you can think of during that time. No idea/goal is too big or too small. If it comes to your mind, write it down. Once your time is up, circle the 7-10 ideas/goals you want to focus on for the upcoming year.

Discipline is the bridge between goals and accomplishments.

Jim Rohn



On the next two pages, write out the 7-10 goals from your brain dump that you want to focus on in the upcoming year. This is just a summary. You will work on the details, including the SMARTER framework a little later. Also choose one of the following categories to assign to each goal:

Professional

Personal

Health

Financial

Relationship

Spiritual



Summary Of My Goals for _____

Goal #1:

Goal #2:

Goal #3:

Goal #4:

Goal #5

If what you are doing is not moving you towards your goals, then it's moving you away from your goals.

Brian Tracy



Summary Of My Goals for _____

Goal #6:

Goal #7:

Goal #8:

Goal #9:

Goal #10:

You will never win if you never begin.

Helen Rowlan



These next pages are where you will get into the details of each goal and apply the SMARTER Framework. I've filled out one page as a sample to guide you as you fill out one page per each of your goals.

GOAL ACTION *plan*

GOAL CATEGORY

Which category did you assign this goal?

GOAL

Write out your goal from your summary page

MOTIVATION

Write out your motivation for this goal such as how it will help you

HOW ACHIEVE

What small steps can you make to attain your goal?

START DATE

When do you plan to start your goal?

DEADLINE

What is the deadline for your goal?

REWARD

This can be an actual award or the end result can be your reward

OBSTACLES TO OVERCOME

What are the possible obstacles that might get in your way of achieving this goal?

HOW TO OVERCOME THEM

What can you do to overcome the obstacle(s)?

ACTION STEPS

List the action steps you will take to activate your goal

COMPLETE BY

List the completion date for each action step

NOTES/RESOURCES

What resources can you use to help you reach this goal.
Examples: books, websites, friends



GOAL ACTION

plan

GOAL CATEGORY



GOAL

MOTIVATION

HOW ACHIEVE



START DATE

DEADLINE

REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES





GOAL ACTION

plan

GOAL CATEGORY



GOAL

MOTIVATION

HOW ACHIEVE



START DATE

DEADLINE

REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES



If you aim for nothing, you'll hit it every time. Unknown



GOAL ACTION

plan

GOAL CATEGORY



GOAL

MOTIVATION

HOW ACHIEVE



START DATE

DEADLINE

REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES





GOAL ACTION

plan

GOAL CATEGORY



GOAL

MOTIVATION

HOW ACHIEVE



START DATE

DEADLINE

REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES



The secret to getting ahead is getting started. Mark Twain



GOAL ACTION

plan

GOAL CATEGORY

GOAL

MOTIVATION

HOW ACHIEVE

START DATE

DEADLINE

REWARD

OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM

ACTION STEPS

COMPLETE BY

NOTES/RESOURCES

What you do today can improve all your tomorrows. Ralph Martson



GOAL ACTION

plan

GOAL CATEGORY



GOAL

MOTIVATION

HOW ACHIEVE



START DATE

DEADLINE

REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES





GOAL ACTION

plan

GOAL CATEGORY



GOAL

MOTIVATION

HOW ACHIEVE



START DATE

DEADLINE

REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES



If you fell down yesterday, stand up today. H.G.Wells



GOAL ACTION

plan

GOAL CATEGORY



GOAL

MOTIVATION

HOW ACHIEVE



START DATE

DEADLINE

REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES



Either you run the day or the day runs you. Jim Rohn



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MOTIVATION

HOW ACHIEVE



START DATE

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REWARD



OBSTACLES TO OVERCOME

HOW TO OVERCOME THEM



ACTION STEPS

COMPLETE BY

NOTES/RESOURCES



Believe you can and you're halfway there. Theodore Roosevelt



Summary of My Goals in _____



Professional Goals

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Health Goals

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Relationship Goals

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Personal Goals

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Financial Goals

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Spiritual Goals

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Success is not final; failure is not fatal: It is the courage to continue that counts.
Winston S. Churchill





ANNUAL OVERVIEW

USE THIS PAGE TO ADD YOUR GOAL TO THE MONTH IT IS DUE

Year: _____

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

A year from now you may wish you had started today. Karen Lamb



Congratulations!

You now have a plan and action steps
to achieve your goals.

Now go make THIS year the BEST year ever!

Thank you so much for your purchase which supports our
small business. If you would like to provide
any feedback or have questions, please email
Donna@Business.Harmony.Life

Please be sure to check out our store regularly, as we will
be adding additional resources including other digital
products and online courses to help you grow
personally and professionally.