

# GOAL SETTING AND AUDIT WORKSHEETS

## GOAL SETTING WORKSHEET

All the goal setting research and programs use essentially the same five rules for defining and pursuing goals. Goals must be realistic, time-specific, stated with a positive declaration, measurable and written.

Here's a worksheet you can use to develop and record any goal you want to accomplish. Start by writing a first draft (as you see it):

My goal is: \_\_\_\_\_  
\_\_\_\_\_

Now go through the first four steps.

### 1. Is your goal realistic, but challenging?

I can accomplish my goal because:

\_\_\_\_\_  
\_\_\_\_\_

### 2. Put a time frame on it:

I will accomplish this goal by \_\_\_\_\_

### 3. Make sure the goal is stated in a positive context: State what you ARE going to do (or be). Don't use negative terms: state it as "I will maintain my weight at 175 pounds" rather than "I'm going to lose 25 pounds"; or "I will have 5 employees" rather than "I will not hire more than 5 employees".

### 4. State it in measurable terms or set up ways to measure it (dollars, steps completed):

Specifically I'll know my goal is accomplished when:

\_\_\_\_\_  
\_\_\_\_\_

### 5. Now write out your final complete goal:

My goal is:

\_\_\_\_\_  
\_\_\_\_\_

# GOAL SETTING AND AUDIT WORKSHEETS

## GOAL AUDIT WORKSHEET

As you develop your business goals, it's helpful to "audit" them. In finances, an audit is a review to see if everything is proper and "balanced". Auditing goals involves testing your motivation and dedication, then affirming that your goals are worthwhile and attainable.

Your "audit" requires an honest self-analysis and answering some soul searching questions. They're not difficult, but don't short change yourself with quick responses or idealistic answers. The point of the exercise is to analyze and confirm what you say you want to accomplish.

The first series of questions test your dedication and desire relative to the goal. These questions begin with "Am I willing to...". For example, Am I willing to get up at 5:30 AM 4 or 5 times a week and exercise? Am I willing to mortgage my house to get my business started? Am I willing to work on Saturdays and Sundays when my friends are golfing or playing tennis?

Fill in the questions with your own situational challenges. Then answer your own questions. Don't settle for a simple 'yes'. Rather, try answering 'yes, because . . .' filling in the 'why'. You may be tempted to soften the questions or rationalize the answers with "I'll take time for myself so I don't get burned out". If you don't ask the tough questions and be realistic about the answers, this will be a wasted exercise.

Next, test your motivation. Start with "Do I believe...". For example: Do I believe this is the right business decision at this time? Do I believe the sacrifices I'll make are worth the intended outcome of this goal? Do I believe I can properly handle employee problems and customer complaints? Again, you have to address the issues that fit your situation and this goal. Obviously all these questions are to be answered 'yes'. That's not the point. If you complete your 'yes' answer with the reason you believe, you'll reinforce a positive attitude and your resolve.

### WILLINGNESS (Dedication, Desire)

Am I willing to: \_\_\_\_\_ ?

Am I willing to: \_\_\_\_\_ ?

Am I willing to: \_\_\_\_\_ ?

### MOTIVATION (Attitude)

Do I believe: \_\_\_\_\_ ?

Do I believe: \_\_\_\_\_ ?

Do I believe: \_\_\_\_\_ ?

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Here are a couple additional questions to test your resolve to overcome obstacles you'll encounter that will further challenge your attitude.

I'll be able to overcome negative input from others by \_\_\_\_\_  
\_\_\_\_\_ (doing what).

I'll be able to overcome the challenge from competition by \_\_\_\_\_  
\_\_\_\_\_.

Now that you know you're on the right track, take time to program into your subconscious mind some affirmations and positive reinforcement. Some helpful examples are noted below. You might write these down and post them where they'll be frequent reminders.

### PROGRAMMING/AFFIRMATIONS

I see myself accomplishing this goal and it makes me feel \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

I'll accomplish my goal of \_\_\_\_\_  
because I feel \_\_\_\_\_,  
and I'm \_\_\_\_\_.

Don't make this too complicated. Your initial response may be too general or you may be tempted to just put in "easy" answers. Go ahead, but try to build more meaningful answers. Example: "I'll accomplish my goal of succeeding at my business because I feel good about it and I'm ready to do it". Doesn't say much, does it? If you have to start there, okay, but don't stop there. Take it to a deeper level.

"I'll accomplish my goal of selling the business in 5 years because I feel I can establish the best service and product support in my industry and I'm hiring good people with solid values who support my vision."

That's an affirmation for success. Good luck.