



# Goal Setting Guide

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## How to use the Goal Setting Guide

1. Set aside half an hour to dedicate to yourself and your future achievement and happiness. Get yourself a cup of your favourite beverage to reward yourself for making such an intelligent decision!
2. Read through the whole process so you can get an overview.
3. Follow the goal setting example you are given so you can see the process in action.
4. Follow the instructions on how to set your own important goals.
5. Sit back and feel a glow of satisfaction at having made the first step in a journey of personal fulfilment and achievement!

## **The Benefits of Setting Personal Goals**

### ***Why set personal goals?***

*“If you aim at nothing, you’ll hit it every time”*

Most of us have come across goals in the workplace, as goals form the core of your workload and provide a focus for your efforts. Goal achievement is often linked to the appraisal process and can affect your salary or your promotional opportunities. But what are the benefits of goal setting outside the corporate arena? There are loads...

### ***Benefits of personal goal setting***

- You get out of that rut
- You take control of your life
- Your actions match your talk
- You focus on the important things
- You are successful, regardless of what that means to other people
- Other people understand where you are coming from

This guide will take you through the practical steps required to create and attain top quality goals, and how to avoid the common pitfalls. It also links with the **Personal Development Plan Guide**, so consider taking time to do that after you have completed the goal setting guide.

Real examples are given to help explain the goal setting theory.

### ***How goal setting changed my world***

Many years ago, as a new graduate embarking on a career in a major blue chip company, a friend’s wise mother lent me a tape on how to set goals. Looking back, maybe it wasn’t that sophisticated, however it really opened my eyes to a new way of thinking and living my life.

I had been successful at school and university but was pretty daunted by the prospect of life in the real world and achieving success there. Goal setting changed my world.

I invested a few hours in figuring out what I wanted to achieve, wrote it down, and then did it. And it worked, (and still works!). I support people taking control of their own destiny and goal setting is a proven means of doing that.

## **Goals and Your Personal Mission Statement**

### ***A little background on how goals work***

Goals are cascaded throughout an organization, where an individual's goals are a sub-set of their boss's goals and so on up the hierarchy. So achieving my goals helps my boss achieve her goals, helps her boss... and so on.

Goal results are set to meet business needs covering areas like meeting shareholder performance targets, customer servicing levels and employee satisfaction. A company with a performance related pay system will use an individual's goal achievement results to allocate pay increases; if you exceed your goals you receive more money.

This is one incentive for an employee to work hard for the company. For this and other reasons, goal setting in the workplace can be an emotive issue and requires careful management to ensure equity.

### ***Without goals, both good and poor performance goes unnoticed***

Conversely, lack of meaningful goals can mean disaster for a business. Individuals can end up doing their own thing, working at cross-purposes, or overlapping effort. Both good and poor performance goes un-noticed, as no one really knows what that is. Sensible companies invest a lot of time and effort in the goal setting process, as they want to succeed.

### ***Goals and your personal values***

You will get the best results if your goals are in line with your personal values. But what are your personal values? Articulating what you are about is a good starting point for understanding your motivations in life and you can do this by writing your own "mission statement."

*"Things which matter most must never be at the mercy of things which matter least"*  
Goethe

### ***Your personal mission statement***

Most companies have a mission statement encapsulating what the company stands for, translating aspirations into employee actions. However they are often made meaningless in the quest to make them politically correct or contain the latest management jargon or look great printed on giant posters. Don't let this put you off!

The meaning of life is a million dollar question. Let's make it easier to answer by narrowing it down, and figure out the meaning of your life. What will your epitaph be?

Start by writing down a few words or sentences that best describe your aspirations, meaning or guiding principles.

You could think of these in terms of the different roles you have (wife, grand-father, manager, coach, son etc) to get a rounded, holistic view of your life. You might want to keep this private as the act of explaining it to someone else may make it lose its meaning. On the other hand, sharing your personal mission statement may provide additional insight. The choice is yours!

Here are a few examples to help you get started on this task;

- I am a healthy person who has the wisdom to know what I can and cannot control in my life, and act accordingly.
- I work to live and provide for my family. This means financially, emotionally and spiritually.

- I am respected in my professional life as being knowledgeable, accessible and eager to learn.

If you are still struggling for inspiration, a great resource is the popular “The 7 Habits of Highly Effective People” by Stephen R Covey, which covers this in detail.

Stick with this phase through all the soul searching and ambiguity, as in the words of the Cheshire Cat in *Alice in Wonderland*...

*‘If you don’t know where you’re going, it doesn’t matter which way you go.’*

Indeed!

## How to Write SMART Goals

### *Writing your goals*

Okay, that’s enough of the “deep and meaningful stuff”. A little bit of introspection and navel gazing can do you good as long as you translate that new understanding into action. So let’s get down to the nitty gritty task of writing your goals.

**Top Tip** – from my experience as a manager, people become impressively creative in the art of work avoidance when they are asked to do their goals!

Like clearing out the attic or weeding the garden, the more chaos and mess there is, the less you want to do it! The only instruction I can give is to stop procrastinating and just do it!

You’ll be glad you did! People’s main concern is often that the goals they had written were not “right”. There is no such thing as a “right” goal, only what has meaning for you.

A goal that is written 70% well is better than no goal at all. Give yourself permission to give it a try, and worry about fine-tuning your goals later.

### **SMARTness in goals**

The world and his wife generally expect that goals should be SMART. This stands for **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime-bound, and is a useful reminder of how to write a top quality goal. Here’s what it means...

**Specific** – your goal should have its expected outcome stated as simply, concisely and explicitly as possible. This answers questions such as; how much, for whom, for what?

**Measurable** – a measurable goal has an outcome that can be assessed either on a sliding scale (1-10), or as a hit or miss, success or failure.

**Achievable** – an achievable goal has an outcome that is realistic given your current situation, resources and time available. Goal achievement may be more of a “stretch” if the outcome is tough or you have a weak starting position.

**Relevant** – a relevant goal should help you on your mission or your “bigger” objectives.

**Time-bound** – a time-bound goal includes realistic timeframes.

**Top Tip** – You should limit your goals to between 5 and 7 at any one time. To achieve your goals you have to focus your efforts and attention. As you progress and complete goals, you may add new goals. If you find yourself with more than 7 goals, you are probably writing mini-goals or tasks. Remember to keep your goals focussed on a major area of responsibility.

A sample completed **goal worksheet** is included (see page 11) to show you how to lay out your goals. As you read through the following explanations, refer to the worksheet so that you can see how the theory has been put into practice.

## **Writing realistic, reachable goals**

Follow this template to fill in your own goal worksheet:

### **1 - Goal statement**

Create a brief summary statement of the goal, and include details such as timing, cost, location etc to make it real.

### **2 - Measure of success and goal assessment**

A measure of success is how you will know your goal has been achieved, and to what degree. You need to make some specific, measurable statements about what the possible outcomes will be, but how do you do that? You have two main choices; “discrete” or “continuous”.

#### *Discrete*

You could use a “discrete” measurement of goal achievement, that is, you either hit or miss a goal. This is a simple way of measuring success. Use with caution though, as missing a goal by a whisker and calling that ‘failure’ can be discouraging.

#### *Continuous*

Or you could measure success using “continuous” results or a sliding scale. This method is common in most large organisations or companies. A rating system determines how effective an employee has been in meeting their goals, e.g. a range of 1-4 where 1 is unsatisfactory and 4 is distinguished performance.

The continuous measurement system takes more effort and subtlety of thought, however it encourages optimistic thinking. Perception of “shades of grey” encourages optimistic, non-depressive thinking and diffuses any emotional response to a goal outcome due to the multiple possibilities.

This is best explained by an example. Your goal is to better manage your monthly budget, and start saving money. What you would “measure” is your monthly bank balance and your possible outcomes could be;

1. overdrawn by 10% or more - unsatisfactory
2. not overdrawn – could do better in some areas
3. saved at least 5% - expected outcome
4. saved at least 10% - distinguished performance

You have articulated what would rank as unsatisfactory through to what is above expectations.

Giving yourself a range of results helps you succeed by keeping you motivated. Also, the top rating may be an aggressive stretch target that will push you to achieve, and provide a challenge.

### 3 - Tasks

Now list the major tasks needed to achieve the goal. Keep this fairly high level to avoid getting bogged down in detail.

**Top Tip** - If you are struggling with this, consider working backwards from goal achievement through to your first step. This exercise is sometimes called “chunking”, as you are breaking down a task into manageable sub-tasks.

The secret of working backwards is to keep it creative and fun; done well it really takes the stress out of goal setting. You start by ‘living in the future’ - telling the story of how your life is now you have achieved your goal and describing how you got there. This description will contain your tasks.

It can be useful to have a friend ask you questions as this will fill any gaps in your plan and they may spot flaws e.g. the funding for your goal came from winning the lottery!

**Question:** How do you eat an elephant? One spoonful at a time.

### 4 - Timing

Putting real dates as deadlines for completing activities increases your success rate. Get out your diary or calendar and have a look at your existing time commitments. Be realistic.

A friend loved to go to the theatre but always forgot to book tickets in advance. As a result, they missed special offers, got the worst seats or missed the show, all of which they complained about. A desire to be ‘spontaneous’ led to a lack of organisational skills that was causing them to fail at their goal of seeing shows.

#### *Getting organised*

If you suspect you may have similar tendencies, don’t panic, help is at hand. Some people are naturally organised – to spot them, check out their CD collection. If it’s neatly lined up in alphabetical order, then you may want to get some tips from them!

These lucky people will find “doing” their goals much easier as they are skilled in organising themselves. For the rest of you, organising your time is a learnable skill (there are hundreds of Time Management gurus after all) so work hard at it, keep focussed and avoid distractions in order to increase your goal achievement success.

**Top Tip** – Do some research on the widely used Myers-Briggs personal preference profile. Take a free online profile, or there are many fee paying sites that offer a personalised summary.

In this context, the important Myers-Briggs dimension is your personal preference for organising yourself and information. At one extreme is the “Judgement” (J) personality where events and activities are planned and executed with military precision, and at the other is the “Perceiving” (P) personality that cruises along seeking distractions and pulls all-night sessions to complete goals on time. Most Myers-Brigg’s sites or books include tips and activities to improve the non preferred profile – so all you “P’s” will find tips to improve your “J” skills.

As with all such models, Myers-Briggs is only that – a model, but it can be helpful in identifying your areas of potential development!

## 5 - Self Assessment

When considering a goal, it is a good idea to examine both your ability and enthusiasm for it.

Tasks that require you to learn a new skill require a different approach than a task you know how to do. There is no need to worry because any gaps in ability or enthusiasm can be closed by appropriate activities. This self-assessment has a direct link to personal development planning (see the **Project You Personal Development Plan** guide), and with goal achievement itself.

Go through each task in turn and ask yourself the following questions. If any of the elements is missing or low, then you can say you have low 'skill' or 'will' in that area. If this is the case, then consider how you can close that gap, and plan it in as a task.

### *Ability (skill)*

- have I been taught to do this?
- do I see this as my role?
- do I know how to do this?
- have I successfully done this, or something similar, before?

### *Enthusiasm (will)*

- do I want to do this? Is it in line with my personal values?
- what's in it for me?
- what is the risk of failure? Am I okay with taking that level of risk?
- do I think I can do it?

**Top Tip** - If you would like to research this model further, suggested reading includes "The One Minute Manager" by Kenneth Blanchard and Spencer Johnson and other books on Situational Leadership.

This is a practical, objective approach and an honest self-assessment will maximise to your goal achievement. A tradesman has to purchase or hire special tools to do some jobs, so why shouldn't you? Admitting you don't know how to do something or that you are scared of doing it is not an admission of weakness. It just means you haven't got the tools... yet.

A useful resource in this area is the free self confidence course from Uncommon Knowledge.

## 6 – Results

As you progress, note your key results and update your goal sheet on a regular basis. A quick review of the tasks, timing and self-assessment will enable you to make any necessary changes.

Allowing yourself the flexibility to change, whilst keeping true to the main objective will boost your success rate more than sticking doggedly to your original plan.

Now take a look at the following Example Goal Sheet to give yourself a template for setting your own goals...

### **Creating a Goal Worksheet**

Use this fictional example goal worksheet to help you see how the theory is put into practice. To learn how to fill it in, see step 5, **Writing Realistic Goals**.



### **Goal Statement**

My goal is to run the London marathon in April 2003, and to finish in a reasonable position and with a good race time.

### **Measures of Success**

**Unsatisfactory** - finish in the top 400, get within 30 minutes of personal best.

**Could do better** - finish in the top 400, get within 15 minutes of personal best.

**Expected** - finish in top 300 and match personal best time.

**Distinguished** - finish in the top 200 and beat personal best race time by 10 minutes.

| <b>Tasks</b>  | <b>Timing</b>        | <b>Self Assessment</b> |
|---|----------------------|------------------------|
| Write up Training Schedule and review with local athletics club.      | By Aug               | Low skill, high will   |
| Follow Training Schedule  | By Sep & ongoing     | High skill, low will   |
| Get diet advice and re-stock kitchen cupboards with appropriate food. | By Oct               | Low skill, low will    |
| Run local half-marathon   | Nov 14 <sup>th</sup> | High skill, high will  |
| Enrol in London Marathon  | By Nov               | High skill, high will  |
| Run the London marathon!  | 23 Apr 03            |                        |

### **Results**

*August* - Researched training plans on the internet and local library and met with local athletics club. They helped me improve my Training Schedule.

*September* – from the **self confidence course** I did (as part of my development plan), I identified that I am most confident when I have a running buddy, so will take my dog out with me for now and look for a running buddy at the local athletics club.

*October* – Had a hectic month at work so haven't sorted out kitchen cupboards and diet, so will need to do this next month. Training Schedule on track.

*November* – ran half marathon and achieved good race time. Bought reflective running gear as a reward and so I can run more safely at night and stick with the Training Schedule.

*December* – stopped taking dog running, as he now can't keep up with me. Need to find a running companion next month! Finally managed to sort out my diet and cupboards. Found out that I was already following a pretty good diet!

*January* – Got flu for 2 weeks so training schedule has been reduced for 3 weeks. No need for a running companion, as I haven't been able to train.

*February* – couldn't find a regular running buddy, so my partner started cycling with me as I ran to help keep a good pace.

*March* –really focussed on diet and mental preparation. Practised mental games to play to keep me focussed when running.

*April* – ran the race and came 235th, and took 16 minutes off my personal best. Although this outcome is between the 3 and 4 ratings, I think I did a great job!

## Reviewing Your Goal Worksheet

Now let's look at how the goal example was put together.

### 1 – General review

Go through each of the **SMART** characteristics and see if they fit with the example plan.

- 1) Is it **Specific**? – Yes, the goal relates to a specific race.
- 2) Is it **Measurable**? – Yes, and have selected the measurement system and a range of outcomes
- 3) Is it **Achievable**? – Yes, I have run marathons before and have a reasonable personal best time, and am confident I can achieve it again.
- 4) Is it **Relevant**? – Yes, it motivates me to go out and train regularly, keeping me fit and providing relaxation.
- 5) Is it **Time-bound**? – Yes, the actual race date is included and each task has been scheduled to fit into the run-up to the date.

### 2 - Self assessment of tasks and link to personal development plan

I have assessed each task to establish if I am high or low skill or will, and will use this information to create a supporting **personal development plan** to close any gaps in ability (skill) or enthusiasm (will). Let's look at each task and self assessment in turn.

*Write up training schedule.*

I previously made up my own training plans and recognise I am not an expert in this field, therefore I have low skill. I am hugely motivated to get this plan right, therefore I have high will. To address the skills gap, I will get help from a local athletics team to plan my training.

*Follow training schedule.*

I have followed training plans before and understand their importance, therefore I am high skill. I am nervous about running on my own, especially in the winter, so I am low will. Need to do something that will increase my confidence.

*Get diet advice and re-stock kitchen cupboards with appropriate food.*

I have never thought about my diet and running before and don't know where to start, therefore am low skill. I love all kinds of food and suspect I may have to stop eating some of my favourites, therefore am low will.

*Run half marathon.*

I have run this race before, therefore high skill. I know it's a great course and my race time will be a good indication of how well my training is going, so am high will. No worries!

*Enrol in the London marathon.*

I have done this before and know I am good at organising myself so am high skill and will. I have included the task as a reminder, as not enrolling would mean I couldn't run and the whole goal would be affected. In business terms this would be called a "milestone".

*Run the London marathon.*

I have not assessed this task, as it is the main goal.

### ***Personal Development Requirements***

I have thought about the actions I need to take to close gaps in ability (skill) or motivation (will) and have summarised them using the **Personal Development Plan** structure.

| <b><i>Focus Area</i></b>       | <b><i>Now</i></b>   | <b><i>Will Be?</i></b>  | <b><i>How known?</i></b>  |
|--------------------------------|---|---|---|
| <i>Creating Training Plan</i>  | Could be better   | Training regularly<br>Injury free                                 | Will achieve marathon goal  |
| <i>Following Training Plan</i> | Nervous running at night<br>Don't stick to training plan. | Running in any condition or time.<br>Feel good am following plan. | Stick to training schedule in winter<br>Will achieve race time goals        |
| <i>Diet</i>                    | Not sure if diet is good.<br>Eat a lot of chocolate.      | Confident am following a good diet                                | At target weight<br>Have energy to train<br>Speak knowledgeably about diet. |

| <b><i>Activity</i></b>                                   | <b><i>Resource</i></b>  | <b><i>Timing</i></b> | <b><i>Reward</i></b> |
|--|---|----------------------|----------------------|
| Research on the internet and local library               | Local athletics club  | By Aug               |                      |
| Self confidence email course                             | <a href="http://www.self-confidence.co.uk/">http://www.self-confidence.co.uk/</a> | By Sep               | New running kit.     |
| See dietician and get expert advice<br>Restock cupboards | Local health clinic<br>My partner   | By Oct               |                      |

## Assessing Personal Development Requirements

In the goal worksheet, the results for each month have been included. You will note that some of the mini goals have not been met e.g. the diet work was two months later than planned and that I didn't follow the plan in January due to sickness. As you see in the end, this has not affected the main goal result. You don't have to win every battle to win the war!

Let's look at why there was procrastination with the diet work. I self-assessed as being low skill and low will. Now I could work on motivating myself and giving some great self-talk on why I should stick to a good diet. But if I lack the basic information to know what that diet is, I am unlikely to make progress. So, by focussing on closing my knowledge gap, I will make the most difference and find the motivation follows. Some people are uncomfortable asking for advice as they feel it exposes weakness.

Things happen as we go along and even the best laid plans can go awry. So what should you do when something does not go to plan? The healthy response is to take action to correct it, and if you can't, let yourself be okay about it and move on.

### *Even the best laid plans can go awry*

Let's look at the sickness in January. The tendency may be to throw up your arms and say it's all over and quit, as the training schedule will be so badly impacted how can I possibly get in enough running?

An alternative, and more useful response would be to say, okay I'm sick, take the appropriate medication and use the rest time to amend the training schedule and work on my mental preparation instead. Perhaps I can spend more time with my partner motivating them to join me in training runs and helping get my pace back.

Optimism in the face of adversity is a learned skill and often, changing how you think about an event can change the whole meaning. Reviewing your progress regularly and being honest with yourself will all help towards increasing your goal achievement success rate.

## Now It's Your Turn to Set Goals

OK, you've read the theory, gone through an example, now it's your turn. Here's a summary of the steps;

1. What are your personal values? What is your **mission statement**?
2. What do you want to achieve? What are your **goals**?
3. Write your goals in a worksheet. Make them **SMART** and use the **goal review** to make sure they are top quality goals.
4. Write your personal development plan. Use the **Personal Development Planning Guide**
5. Review your progress and update your goals accordingly.
6. Celebrate your success!
7. Start the process all over again. Consider making goal setting (at least) an annual event.

You now have the information and knowledge that could help transform your life.

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