



Mastering Business Development[®]

*Personal Goal Setting &
Planning Exercise*

TRAINING & EXERCISE WORKBOOK

I. Personal Goal Setting & Planning Exercise

Goal Setting Worksheet

MY "SMARTS" GOAL FOR THE ROLE OF:

is to:

by:

Signed:

SPECIFIC - Anyone who reads this will understand exactly what it is.

MEASURABLE - Quantitatively, how will you know you've reached this goal?

ATTAINABLE - Do you reasonably believe you can and will achieve this goal?

RESOURCES - Do you have resources to attain this goal in this time frame?

TIME TABLE - Do you have a "timely" plan to achieve this goal in the allotted time?

STRETCH - Will the attainment of this goal force you to stretch emotionally and personally?

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Goal setting is a very personal exercise for each and every individual. Whether we are setting personal or professional goals, the goals that are set and the planning process for the achievement of those goals is unique to the person undertaking that process. Based on many years of working with individuals who are successful in Business Development, we have found that goal setting and goal achievement are the most important characteristics of their success.

EIGHT STEPS FOR PLANNING AND ACHIEVING YOUR SUCCESS

1. A personal self analysis...which is determining your starting point.
2. The process of setting goals in all your roles.
3. A specific plan for your achievement of each goal in each role.
4. How to anticipate and deal with all obstacles as part of the planning process.
5. How to establish check points along the way in your planning process.
6. A check-off system to let you know what specific steps are completed as part of your plan.
7. A reward system to keep you motivated and focused on your goals and plans.
8. A review process to revise your goals and plans if appropriate.



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Step 1

SELF ANALYSIS/YOUR STARTING POINT

1. List all of the roles in which you function on a daily basis:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

2. Rank your roles in order of importance to you:

1) _____	7) _____
2) _____	8) _____
3) _____	9) _____
4) _____	10) _____
5) _____	11) _____
6) _____	12) _____

3. In your roles today what gives you the greatest sense of accomplishment?



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4. In your roles today, what gives you the least sense of accomplishment?

5. What do you consider your most significant personal strength?

6. What do you consider your most limiting characteristic?

7. In _____ years what would you like to change about yourself or your present situation and why?

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8. What do you get the most enjoyment out of doing on a daily basis?

9. From your past experiences in all your roles, what is personally the most rewarding?

10. If you died today, what would you say that you regretted not having done?

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5. What is the primary role associated with each goal?

6. Do you have the balance of roles and goals that you want for your future?

7. Success in life is not in acquiring but in **being**. What do you want to be in 5 years?



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Step 3

PLANNING WORKSHEET A

Goal (Be specific): _____

Priority #: _____ Date To Be Achieved: _____ Review by: _____

Specific Steps I Must Take To Achieve This Goal	Date Accomplished	Risk (L/M/H)
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1)		
2)		
3)		
4)		
5)		
6)		
7)		
8)		
9)		
10)		



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Step 4

PLANNING WORKSHEET B

Goal (Be specific): _____

Priority #: _____ Date To Be Achieved: _____ Review by: _____

List of obstacles I must anticipate to achieve all steps:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____

How will I deal with each obstacle anticipated?

Obstacle #1: _____

Obstacle #2: _____

Obstacle #3: _____

Obstacle #4: _____

Obstacle #5: _____



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Steps 5 thru 8

PLANNING WORKSHEET C

Goal (Be specific): _____

Priority #: _____ Date To Be Achieved: _____ Review by: _____

1. My major reward for accomplishing this goal will be: _____

2. My minimum rewards and check points for accomplishing each step of this plan are: _____

Specific Steps I Must Take To Achieve This Goal	Date Accomplished	Risk (L/M/H)

3. I agree to review the goal and plan for revision by: _____

Signed: _____

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