



## Unit 2

# Goal Setting

### Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Identify what's important to you in your life
- ✓ Use goal setting activities and appropriate language to articulate what you want in your life
- ✓ Explain what your dreams and goals are for both the short and long term
- ✓ Use motivating techniques to help you reach your goals
- ✓ Understand how to deal with setbacks

## Unit 2

### Goal Setting Activities

#### Self-Understanding

##### Understanding the Importance of Goal Setting

Have you ever read a book in the **Chicken Soup for the Soul** series? According to their website, as of 2011 there are nearly 200 titles in this popular blockbuster series. It is now produced in more than 40 languages, with over 112 million books sold since the first book launched in 1993. This success has not been accidental. Creators Jack Canfield and Mark Victor Hansen were focused and deliberate and took risks. They turned an idea into an international powerhouse.

**Jack Canfield** teaches that we are the average of the five people we hang out with the most. This means that our lifestyles, income, and success are around the average of our friends. By extension, this means that if you are not content with where your life is going, you need to undertake an upgrade.

Yes, that means that you may need to find some new friends, meet new people, and change your outcomes. If you need to make big changes, this can require lots of grit and courage from you. If you look around your current environment and think of people you know that are getting what they want from life, you may see that they've made these changes already.

You'll also see people who allow the world to control their outcomes and who do not take personal responsibility for what happens in their lives. These are people who talk about how hard (or unfair) life is, how they can never get a break, or how someone else has all the luck. Unfortunately, they may not be looking at how hard those people have worked to create what they have.

Getting what we want takes **determination and drive**. It takes a commitment to ourselves and an understanding of how things work to get what we want. In order to determine which tasks will bring us to where we want to be, we must set goals, write them down, and then go after them. **But which goals should we choose to devote our energies to?**

##### Choosing a Mentor

**Do you remember who won major literary, science, or medicine awards last year or the year before? What about an Academy Award for best picture three years ago?** While you may know who has made

certain achievements in your industry, you probably cannot answer many of those questions. While we do tend to make a big fuss about these things at the time, these successes are not carried forward from one year to the next. The people who make a meaningful difference in our lives are really the people who touch us in a significant way.

Getting what you want out of life can be helped along enormously by having a **mentor** or **coach** who can help you to stay on the path, answer your questions, or offer you moral support when your resolve starts to falter. As we continue to take advantage of our ability to move anywhere in the world, we get farther and farther from families who at one time would have been our mentors. We belong less to religious communities and close neighborhoods, from whom we might have received support in the past. However, with the availability of inexpensive telephone contact, the Internet, and web friendly applications, we can keep in touch with people around the world.

**Take a few minutes and write the names of three people that you know will support you in reaching your goals. If you do not know three people right now, think of people that you would like to ask. Later in the course, we'll talk about how to bring the right people into your life.**

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One of our instructional writers shared this story about a mentor she had early in her life:

I was in the fifth grade, and had this incredible teacher. He was in his late forties when I met him, and had been teaching for about five years. Being an educator was not his first career, but he was absolutely passionate about it. He would go to a night course, and then be teaching us what he learned the following day. He was also passionate about music. He had a piano in his class and a double bass. He was an integral part of the ukulele movement that swept the country in that decade, dedicated to spreading his love of music to kids who were hungry for it. His wife and children were involved, as were his students. His love of learning and dedication to his work were infectious, and he showed me how teaching was the best place for me to dedicate my energies. Even years after I had moved away, his example led me to finish a Ph.D. where I could apply my energies to helping other people do and learn their very best.

**Who are your mentors?**

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**Who do you admire and emulate?**

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**What makes them important to you?**

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## Laying the Foundation

### Creating Your Personal Vision Statement

If you want to feel like you're getting more out of life, then we recommend that you set a personal vision statement. This will then help you set short and long term goals, which should influence your daily plan. Think of it like a pyramid:



There are three important steps to creating your personal vision.

**Step One: Identify Your Values**

The list below reflects some common values. Choose the ten that are most important to you as a person (meaning that they apply both at work and at home). You can customize the wording, or add your own to the list.

Ability to make decisions and implement them	Ability to persuade and influence others	Achieving excellence
Achieving fame and recognition	Adventure and excitement	Behaving ethically
Being challenged by pressures and deadlines	Being organized and dependable	Being skilled and capable
Building a family	Building meaningful relationships with others	Competition with others
Contributing to society	Cooperation with others	Demonstrating expertise
Diversity in daily tasks	Doing something meaningful	Efficient and effective
Enjoying what you do	Environmental rights	Establishing a reputation
Expressing creativity	Feeling excited and stimulated by life	Feeling independent
Feeling of belonging and community	Feeling of inner harmony	Feeling of patriotism
Financial security	Financial wealth	Free speech/human rights
Freedom to set your own pace and goals	Having a feeling of security	Having power and control
Having privacy	Helping those in need	Religion and/or spirituality
Leading others to success	Moving at a fast pace	Moving at a slow pace
Being productive	Reliability	Self-development
Sense of accomplishment	Serving the public	Spontaneity
Truth and integrity	Working as part of a team	Working individually

We cannot focus on too many things at one time and remain effective. Look at the ten values you selected and select the five that are most important to you. Cross the others off. Be firm with yourself if you need to be. Remember, you are focusing on what is really important to you.

Next, reduce the list to just three values. These are the things at your very core. Cross the other two off your list. Put circles around the three items that are your core values.

**Step Two: Define Your Values**

Now, outline what success for each of those values would look like.

**Value One**

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**Value Two**

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**Value Three**

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**Step Three: Put It All Together**

Finally, bring the three statements together into one paragraph. You may feel that you need to go back and re-evaluate your values, or you may want to re-work some sentences to create what is meaningful to you. That's OK! Above all, this should be a reflection of your innermost thoughts and a roadmap for how you would like to conduct your life.

**Write your personal vision statement here.**

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Value	1	2	3	4	5
I know what my top five core values are.					
My family and friends know what my values are.					
My goals are based on my values.					
When I need to make an important decision, I base it on my values.					
I live my life according to my core values.					
I feel satisfied when I achieve a goal.					
I discuss my values with friends, family, and co-workers.					
My friends and co-workers share similar values.					
My company reflects my values.					
People who know me could likely identify and list my values.					

### Scoring

Now, add up the numbers that you chose for each statement. Write your total here: \_\_\_\_\_

Here is what your numbers mean.

- 10-20: It's time to have another deep look at your core values.
- 21-30: You could benefit from working on your values and defining what you believe.
- 31-40: You have developed some great habits. Are you ready to do some more?
- 41-50: You have an excellent understanding and demonstration of your core values.

### Where our Values Live

Now that you've determined what's important, let's see where you are at with things.

#### Step One

First, describe how your core values are reflected in these areas of your life.

**Work**

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**Home**

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**Key Relationship**

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**Family**

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**Friends**

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**Hobbies/Interests**

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**Step Two**

After you have identified where your values are reflected, go back through the list and add notes about where your core values are not reflected in these areas of our life. Underline these areas.

**What's In Your Bucket?**

**The Bucket Principle**

The term “kick the bucket” is synonymous with passing away. Rather than having regrets or things that you wish you had done before you got too old (or not physically able), we want to help you figure out what’s in your bucket! Then, you can make those dreams and wishes reality.

If you’ve seen the movie *The Bucket List* starring Jack Nicholson and Morgan Freeman (2007), you know what we are talking about. In this movie, the two main characters meet in hospital. The story unfolds as one character helps the other to live the events on their list. Our goal is to help you get your bucket list written down and get these things started!

**Write your bucket list here. Aim for at least 50 things. (There is additional space on the next page.)**

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Generate at least three ideas about one of these points.

Step: \_\_\_\_\_

Ideas and Thoughts

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## Evaluate your Goals

### Getting Down to Business

Identifying Goals

**Where Are You Goaling To?**

Once you have a good understanding of where you want to go, it's time to sketch out what that might actually look like.

What areas of life do you want to set goals in?

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These areas should tie in with your vision statement and your core values. If not, evaluate them. Do they really reflect who you are?

**In our earlier example, our value statement was:**

“In my life, I gain satisfaction from each day by being as productive as possible. Being productive means feeling good about what I have accomplished at the end of the day and feeling like I have served my staff and clients as well as my organization. It is important to me to do this in a way that allows me to feel good about my choices and to have a sense of inner peace when I review how things went at the end of the day. I get the most satisfaction from working within a leadership role, supervising and managing others to help them do the best work that they can, and encouraging their responsibility and accountability in the same way that I hold my own. A sense of security about my income, choices I have made in terms of saving for the future, and providing for my family helps me to do the best work that I can.”

My specific dreams might include:

- Set up an organized home office.
- Start my own consulting business.
- Learn how to do yoga and practice it daily.
- Climb Mount Everest.
- Save one million dollars.

Remember to check back with your bucket list!

Now, clearly some of these are achievable in the short term while others will take longer. Some will obviously take more work than others. That’s why it’s important to have a plan.

### **Stretch Goals and Risk Taking**

When it comes to setting goals, you need to select things that motivate you and make you **stretch**. Sometimes, stretch goals happen because our employer sets a goal for us that makes us feel a little out of our element. Other times, this is a goal that we set for ourselves.

When you set a goal that forces you to stretch, your mind becomes more interested in what is going on and in the discomfort that it creates. This is our mind and body getting into alignment. Getting out of our comfort zone helps us create the circumstances that we need in order to get what we want.

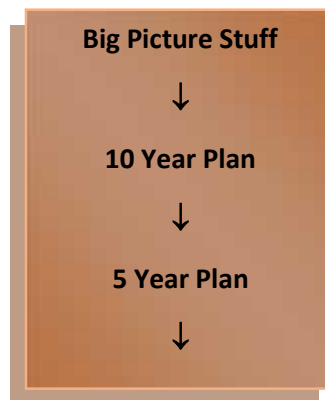
For example, say that your goal is to **purchase a new car**. You do not want to take on any kind of debt, so you decide to pay cash for the car. If you are financially well off and have access to lots of cash, you might be able to walk into a car dealership and pay for your car without issue. Therefore, this is not much of a goal for you. It surely did not require you to stretch in anyway!

However, if you do not have much money saved, and want to avoid the debt, then you will have to come up with a plan to earn that extra money to purchase your car. Doing so will mean making changes in what you earn (so that you can bring in more money). You will also have to save the money (which might also require that you make changes to your spending habits). That means continually making decisions to direct money to your savings until you have enough set aside to pay for the car.

**Selecting easy goals** won't excite you and motivate you to go them. If your goal is to get from here to there, it really depends on what is in your way (and whether you feel challenged by the barriers that are present), or whether there is nothing in your way and you can get there easily.

**If you want real change to take place**, you've got to be willing to take some risks and go after what you want. The degree of risk that you can live with will dictate how much stretch is in your personal goals. Setting some goals that scare you a bit will add enough excitement and adrenaline to help you move toward them.

If you take a few moments and close your eyes, **can you see the big picture** for your life overall? Not everyone can, so they may start with a shorter plan (the 10 year or 5 year or 2 year projections) and then set up short term goals to help them along the way.



### Goals with SPIRIT

When you are creating big goals, you may need to break them into several small, achievable objective or goal statements that will help you get where you want to go. Good goals have SPIRIT as you look at the things you want now and into the future.

### Specific

Be specific about what you want or don't want to achieve. The result should be tangible and measurable. "Look gorgeous" is pretty ambiguous; "Lose 20 pounds" is specific.

### Prizes

Reward yourself at different points in the goal, particularly if it's long-term. If your goal is to clean up the

backyard to prepare for winter, you might treat yourself to a special meal cooked outside when you are all finished. For bigger goals, check your bucket list to see if there are things on there that could be good rewards!

### **Individual**

The goal must be something that you want to do. If your spouse wants you to lose 20 pounds but you think you look fine, you're not going to want to work towards the goal. When your boss is setting targets for you at work, try to find an aspect of it that is meaningful to you and that you can connect to. (This is where working with people and organizations that have similar values to you is helpful.)

### **Review**

Review your progress periodically. Does the goal still make sense? Are you stuck? Do you need to adjust certain parts of it?

### **Inspiring**

Frame the goal positively. Make it fun to accomplish. For example, you could make a poster of the end result, frame it, and post it on the wall.

### **Time-Bound**

Give yourself a deadline for achieving the goal. Even better, split the goal into small parts and give yourself a deadline for each item.

### **Example: Renovating My Backyard**

I am excited to be renovating the backyard and completing the work by the end of this month. The trim lawn and new shrubs will be a great backdrop for the brickwork patio and new barbecue. When everything is finished, I will reward myself with a complete meal prepared in the yard. I will invite my best friends over to share and celebrate with me.

My Dreams and Goals

Dreams	Objectives
	Specific goals (SPIRIT)

Getting Started Today

Ready, Set, Go!

Eat That Frog!

It's not enough to create thoroughly developed and engaging goal statements and vision sheets. **You have to start somewhere.** You don't have to wait for the perfect time; that may never come, which means you won't get on with things. You do not have to have everything perfectly ready; nothing is ever

perfect. Just take the first steps, feel the energy that results from having things underway, and get going.

One of the things that can get in our way is **procrastination**. We find (or create!) excuses so that we do not have to do the work. We even say that we do not wish to fail, so we are better off not to try.

All of these things can be forms of procrastination. We would like to share Mark Twain's expression about frogs (which was also used in Brian Tracey's book called *Eat That Frog*):

*"If you eat a frog first thing in the morning, the rest of your day will be wonderful."*

– Mark Twain

The idea here is that instead of continuing to look at something unpleasant, you should just get on with it.

*"If you have to eat a frog, don't look at it for too long."* – Mark Twain

Sometimes, we need to do the yucky stuff first, and then get onto the other stuff. This can help prevent the **90% phenomenon**, where you get stuck at the end of your task and never quite get it wrapped up.

**If you do catch yourself procrastinating**, look at what you are getting out of it. Sometimes there is a reward we give ourselves for procrastinating. For example, if we are so busy that we cannot get everything done, sometimes we get sympathy from other people. Other times, we feel needed when we have a long to-do list.

### **Prioritizing Tools**

The other aspect to getting things underway is to prioritize them and then work on the things on your list in order. This way you are sure to get it done.

You can use whatever method you like to set up your task lists – just make sure it's a method that works for you and that you can use. There are all kinds of systems available, including:

- Traditional paper-based day planners
- Free e-mail systems
- Applications for computers, tablets, and smartphones
- Websites and paid services

Other sites can help you to complete a list of goals within 365 days, track your health and exercise results, keep lists of books you have read, and much more. An online search will help you to locate these tools and applications if you are interested, or you could ask friends to see what they are using and

which systems they prefer.

### Visualization Techniques

Athletes and personal coaches are big supporters of visualization techniques because they are so effective! The idea is that you fix a picture of the goal in your mind: think of the goal as if it were already yours and what you and/or the things around you look like. Focus on how good that feels and what the benefit is to you. Let the vision fill your body with the energy that comes with it.

**Visualization** is an important part of goal setting. It will help you to make sure that the goals you have recorded are the things that you want. For example, let's say that you have a goal of finding a new job and you finally achieve it. However, if the tasks at the new job are exactly the same as the old one, and what you really wanted was a job with something different, you are not going to be satisfied with the new job.

**The lesson:** Make sure you can define and visualize your goal so that you get what you really want.

### Support Systems

Many of the things we really want require some kind of support or assistance from other people. We just can't get everywhere and do everything we want without some help.

**Goal One:** \_\_\_\_\_



## Executive Management

Goal Two: \_\_\_\_\_

People I will go to for support and what I need them to do	Resources I will need and where/how to get them
Goal:	
Potential problems and how I will minimize/eliminate them	How I will thank the people in my Help Line

Goal Three: \_\_\_\_\_

People I will go to for support and what I need them to do	Resources I will need and where/how to get them
Goal:	
Potential problems and how I will minimize/eliminate them	How I will thank the people in my Help Line

### Action Planning and Follow-Through

Your goal sheet can also serve as inspiration for your action plan, or you may need to reorganize it slightly to be able to list the tasks that you need to complete. Your action plan should include:



## Dealing with Setbacks

**You are going to have setbacks.** There will be times when nothing seems to be working, you have a rash of calamities that seem to get in the way of achieving your goals, and/or you feel tired or under-motivated.

Everyone has setbacks! Remind yourself of that from time to time. Then, just like falling off a horse, remember to **GET BACK ON AND KEEP GOING**. As well, evaluate your action plan. If it is flawed, you may need to replace it with a new one. That's okay! The value comes from creating a plan; following through; dedicating the time, energy, and resources to get things done; and adjusting the plan as you go.

This process may seem simplistic, but it's how successful people do it. People – like companies – can go through rough patches. Ideas that seem great on paper may not work out in real life. Economies falter, wars break out, crops fail, and prices go up. But goal achievers are optimists! They see how good things are when they set their minds and energies to a task, and because their results speak for themselves.

Remember the steps to success that we introduced earlier:



When you encounter a challenge, see where this particular setback fits in this process. Do you need to go all the way back to Step One and set some new goals? Or do you need to make adjustments to the action plan so that you can get things back on track?

