

Goal Setting, Planning & Execution Workbook

Table of Contents

[Table of Contents](#)

[GOAL SETTING](#)

[WHY DO YOU NEED GOALS?](#)

[THE GOAL FUNNEL](#)

[GOAL CATEGORIES](#)

[GOAL CATEGORY ACTIVITY](#)

[GOAL STATEMENTS](#)

[BE DO HAVE](#)

[PLANNING & EXECUTION](#)

[Planning & Execution Steps](#)

[HABIT TRACKER](#)

[ACTION PLANNING](#)

[SCHEDULING](#)

[GETTING IT DONE WITH YOUR DAILY TO DO's](#)

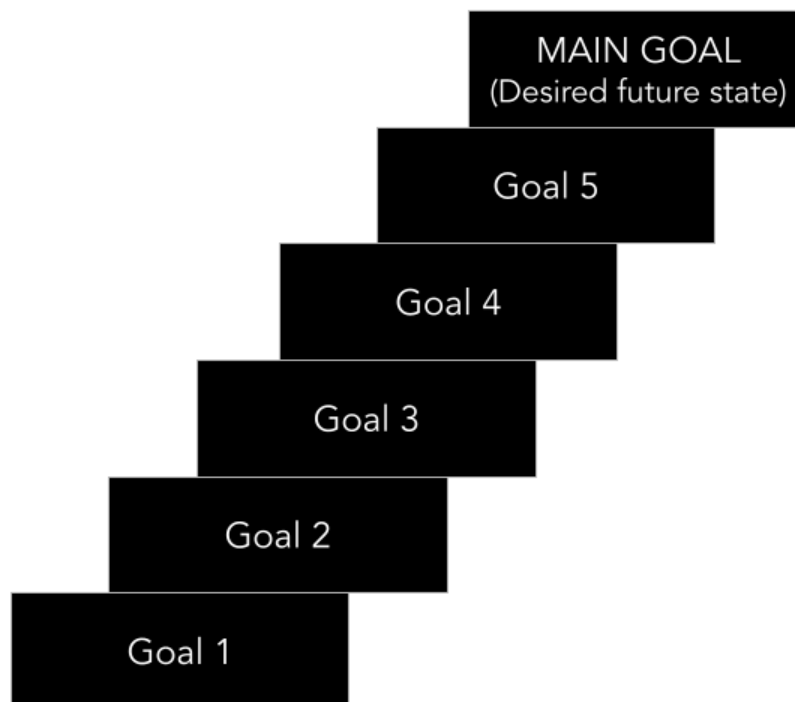
[YOU GOT THIS](#)

[FREE PRINTABLE PLANNER](#)

GOAL SETTING

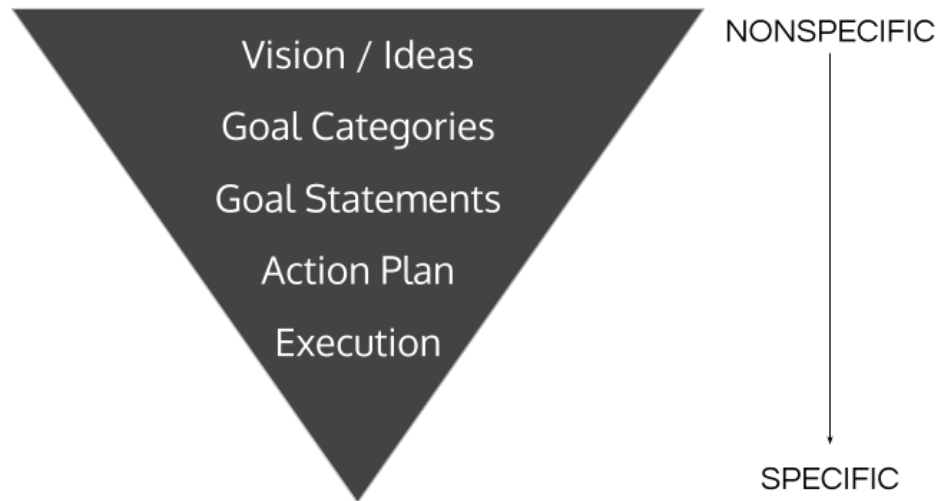
WHY DO YOU NEED GOALS?

- Setting goals gives you long-term vision and short-term motivation. By setting a goal you have allocated some thought to your future and have a basic understanding of the ideal results of the path that you're on. With your long-term vision in mind, you will have an understanding of the steps you will need to take now that will lead you to your future vision and achieve your goals. Therefore goals create a sense of urgency or motivation with present tasks in order to lead you to your desired future state.
- Goals provide focus. There are infinite possibilities for your life. It is impossible to do it all and to learn it all, therefore we have to spend our time strategically to develop and learn the things that will have the greatest impact in your life. Goals provide focus to your acquisition of knowledge and help you allocate your limited time and resources so that you will focus on the things that will get you to that desired future state.
- Goals are a tool of continuous improvement. Continuous improvement involves analyzing the current state of things and identifying areas that need improvement. Then by creating goals for improvement, you will allocate the time and resources to achieving incremental improvement in the identified areas.
- Track Progress: Goals provide a measurable target that help you identify when you've made a certain level of progress. While working toward your goals, you can track your progress by looking at how close you are to achieving that goal. For example, if your goal is to write a book, you can track your progress by the number of chapters or pages you have written.



THE GOAL FUNNEL

The goal funnel is a model that identifies how to set, plan and achieve your goals. Moving through the goal funnel takes you from identifying your vision and ideas, identifying goal categories, writing goal statements, developing an action plan to executing on that plan. As you move through the funnel, you become more specific with your ideas and plans so that you can identify specific actions that will result in achieving your goals.



VISUALIZATION

Step one is visualization. So take a moment to close your eyes and imagine the life you envision for yourself in the future. Think about:

- What activities do you participate in?
- What skills have you developed?
- What kind of person are you?
- What kind of relationships do you have?
- Where are you in terms of your health and wellness?
- What have you achieved?
- What have you learned?

Open your eyes and make some notes on what you visualized.

What Did You See?

GOAL CATEGORIES

There are six main categories that people tend to hold simultaneously. What goals / what do you envision for yourself in each category? In the following activity, write down any goals or visions that you have in your mind in each category.



GOAL CATEGORY ACTIVITY

1. Write down all of the goals that you can think of in each category.
2. Highlight goals that will have the greatest impact on your life and focus on those first!
3. Then ask yourself WHY you want to achieve each goal. What is the impact that each goal will have on your life?

Health & Wellness	Financial	Business & Career	Relationship & Family	Education	Personal Development
Write down as many goals as you can think of in each category.					
Why do you want to achieve the highlighted goal?					

GOAL STATEMENTS

It's time to write down your goal statements! From the goals that you have highlighted in the previous activity, select 2-6 of those goals to write statements for. When selecting how many goals to focus on, make sure that you understand realistically how much time and resources you have available to dedicate towards your goals. The more goals that you focus on at one time, the less time/attention/resources you have to allocate to each!

Your goals should be:

- **Specific:** They should identify a single specific outcome that is easy to understand.
- **Measurable:** You should be able to indicate exactly when and how these goals will be achieved, with some sort of measurable aspect. For example, the amount of money saved. This may not be the case for goals in the relationship/family category or personal development category.
- **Achievable:** Your goal should be challenging, requiring time, effort and attention from you. However, your goal should not be too challenging to the point where you become discouraged with the apparent impossibility of the task.
- **Realistic:** Your goals should be realistic within your capability and the time you have available to you.
- **Time Based:** Identify a specific time frame and deadline by which you plan to accomplish your goal. This creates a sense of urgency in order to inspire action.

Goal Statement Examples:

"I will have \$10,000 saved in 1 year."

"I will run 10km by the end of the season."

"I will complete a photography course this year."

"I will achieve my career objectives this year, which are...."

Goal Statements	Time Frame
I will....	

BE DO HAVE

BE (The Mindset)

DO (The Actions)

HAVE (The Goal)

- We focus so much on what we want to HAVE (the goal) and what we have to DO to get there.
- For lasting changes, we have to focus on WHO we need to become.
- What kind of person accomplishes the goals you want to accomplish?

The type of person who accomplishes these goals is...

PLANNING & EXECUTION

It is not enough to simply set goals and write out goal statements! In order to achieve your goals you need to PLAN to do so and execute your plan with ACTION!

Planning and execution is all about the strategic use of your time and resources. Before you can allocate your time, you need to identify how you spend your time currently.

Planning & Execution Steps

- Habit Tracking Assessment
- Create an Action Plan
- Schedule

- Habit Tracking Exercise: Write down every activity that you do each day for an entire week. Include the amount of time spent doing each activity.
- At the end of the week, highlight each activity as: **Essential** **Productive** or **Not Productive**. If you find that there is a lot of “Not Productive” time and activities in your routine, it’s time to make some changes!

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ACTION PLANNING

Now start creating your action plan for all of your goals! Your action plan is a list of all of the actions required to accomplish the goal.

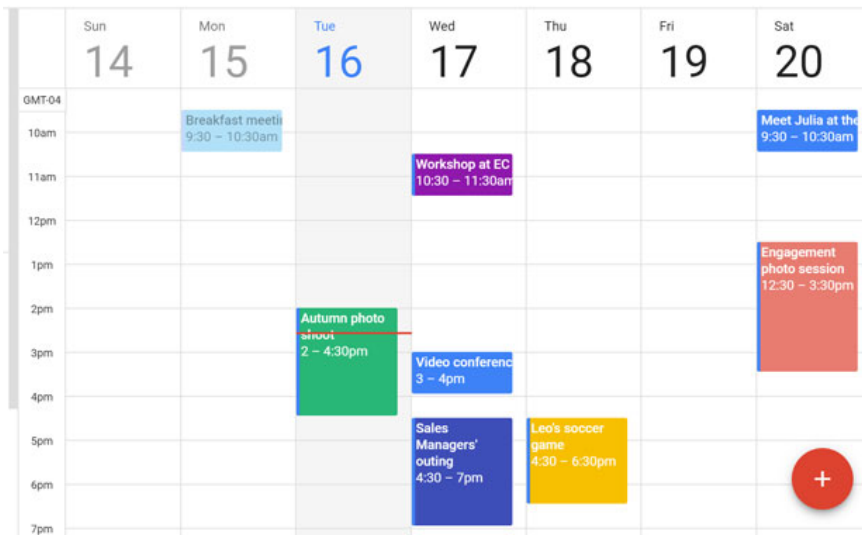
For example: In order to run 10km by the end of the season, you may need to:

- Buy running shoes
- Buy running equipment
- Create a diet plan
- Create a stretch routine
- Plan a running route

Identify your goals and the action steps required to achieve each one:

Goal 1:	Goal 2:
Action Steps	Action Steps
Goal 3:	Goal 4:
Action Steps	Action Steps
Goal 5:	Goal 6:
Action Steps	Action Steps

SCHEDULING



Once you have your action steps identified, you have to schedule them! Scheduling is all about allocating your time. You can use any scheduling tool that works for you such as a digital calendar or physical agenda / planner.

When creating your schedule...

- Start by inserting your deadlines into your calendar. Your deadlines are the end of the time frames you have identified for each goal.
- Next create milestones in your calendar. For example if you plan to save \$1,000 in 4 months. At the 2 month mark, insert a milestone of having \$500 saved. Break your goal down into multiple milestones and put them into your calendar.
- Then craft your daily schedule or your daily To-Do list that incorporates your action steps.

GETTING IT DONE WITH YOUR DAILY TO DO'S

In your schedule, create a daily list of tasks or time blocks to work on your goals! Each and every day you should know exactly what activities to engage in that will advance your goals.

For example:

- Every Monday from 3-4pm you might have "Practice Photography" scheduled.
- Every Tuesday and Thursday you plan to read 30 pages from your book to work on your personal development goals.
- Every Friday you plan to run 2km to work on your fitness goals.

Identify the tasks and actions to work on daily to ensure you are making consistent progress each week! This way, each day you wake up knowing exactly what you need to do and you can narrow your focus and your intentions on a small group of tasks instead of having large daunting goals looming over your head.

YOU GOT THIS

Achieving your goals does not end with simply planning for success. In order to successfully accomplish the goals you have set, you must execute your action plan by keeping yourself accountable to your plan. Every day, set your intentions and commit to working on your goals, sticking to your schedule and completing your to-do lists.

We know that the journey can be difficult at times and some days may feel harder than others, but that is okay! Whenever you stray from your schedule or take time to rest, always remember to come back to your action plan and keep trying!

You got this!

And don't forget, when you achieve your goals, make sure to celebrate your success! You earned it!

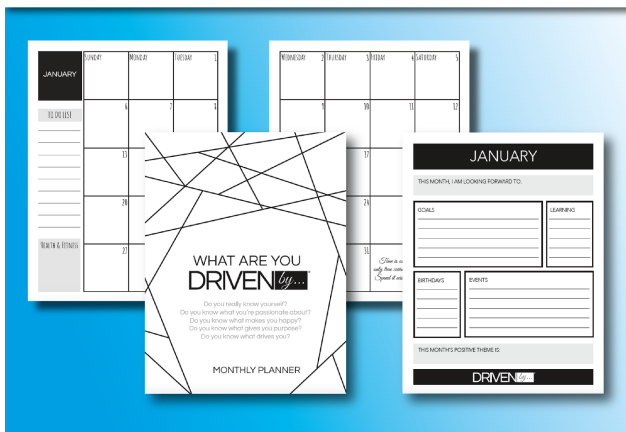
Good luck!

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DRIVEN *by...* Monthly Printable Planner



FREE PRINTABLE PLANNER

To help with planning your goals and your schedule we have a free Monthly Printable planner available for you to download!

It includes full month calendar spreads, notes pages, and goals and events pages for each month. The planner begins with a section to note your goals for the year and a reflection page for the end of the year to see how you did!

Download Yours at:

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