

# Goal Planning Worksheet

## Identifying and Setting Goals

So far, defining our vision and our values has been somewhat like a dream. Now we can begin to solidify those dreams by placing them in our goals list. It is our value system that tells us WHY we want to reach a particular goal. Without a clear understanding of our values, a goal can be written down but probably will not be realized. We have multiple goals in many areas of our life. For this plan, we will be focusing on the most important goals in each of three areas: personal, professional and financial.

In order to work, our goals must be:

1. Clearly defined (What do I want?)
2. In alignment with our values. (Why do I want it?)
3. Time specific (When do I want it?)
4. Owned by you. (What will I overcome or give up to get it?)
5. Planned (How will I make it happen?). Keeping asking “how” until you get down to individual steps.

## Setting Your Goal and Creating the Steps

Example Goal:

**What do I want?** *2004 Limited Edition Neiman Marcus Purple Cadillac XLR with silver trim, tan leather interior convertible in mint condition, driven 2000 miles. Cost \$85,000 new – I will pay \$50,000.*

**Why do I want it?** *For Fun*

**When do I want it?** *May 28, 2005*

**What will I overcome?** *Procrastination*

**How could I make it happen?** *Review message boards, call Neiman Marcus current owners, look in newspaper and on Internet, call dealerships, drive a sample model*

**(NOTE: If you find yourself saying “I don’t know, then your task is to ask more questions).**

**My #1 Personal Goal:**

What do I want?: \_\_\_\_\_

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Why do I want it? (Value) \_\_\_\_\_

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When do I want it? \_\_\_\_\_

What will I overcome or give up to get it? \_\_\_\_\_

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How could I make it happen? \_\_\_\_\_

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**My #1 Professional Goal:**

What do I want?: \_\_\_\_\_

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Why do I want it? (Value) \_\_\_\_\_

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When do I want it? \_\_\_\_\_

What will I overcome or give up to get it? \_\_\_\_\_

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How could I make it happen? \_\_\_\_\_

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**My #1 Financial Goal:**

What do I want?: \_\_\_\_\_

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Why do I want it? (Value) \_\_\_\_\_

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When do I want it? \_\_\_\_\_

What will I overcome or give up to get it? \_\_\_\_\_

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How will I make it happen? \_\_\_\_\_

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**Writing a Goal Statement**

It is \_\_ (date) \_\_\_\_\_ and I am \_\_ (describe what you want). I am so glad that I  
\_\_ (what did you overcome or give up) \_\_\_\_\_ and that I took action daily in my plan.

Now that I have \_\_\_\_\_, (describe what it's like to have the item, or freedom,  
or fun or other value that you seek).

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