Goal Setting
for Personal and Professional Success

1-800-899-8174 / 757-363-6777
www.OptimaEAP.com

All material provided is confidential and is the sole property of Optima Health and may not be duplicated or reproduced in any media or form without the express written consent of Optima Health.
Objectives

- Identify the importance and impact of setting goals
- Review the goal setting process
- Define characteristics of effective goals

Goals… At a Glance

A goal is a desired end-point toward which effort is extended. Without goals, individuals (and organizations) risk… stifling potential and missing opportunities, wasting time and energy on things that aren’t priorities, and not achieving desired outcomes. Goals help turn a vision into a reality.

Goal Setting Process

Goal setting is the structured practice of focusing attention and mobilizing the resources and energies needed to create a desired future.

The steps to set effective goals include:

1) Choose your area of focus
2) Allow yourself to dream
3) Define the desired outcome
4) Consider the details
5) Identify supporting tasks
6) Assign a timeframe
7) Finalize your goal
8) Pursue your goal

STEP 1: Choose Your Area of Focus

Identify an area of your life to which you want to focus attention and energy. It may be an area that is of greatest value to you, or it may be an area that you feel could benefit from renewed attention.

Check your desired area of focus:

- Career/Professional*
- Financial
- Social/Relationship
- Health/Wellness (physical & emotional)
- Spiritual
- Self-Development (education/improvement, hobby, recreation)

* When considering professional goals, some may be performance-related (activities necessary for you to be successful with your current role), development-related (learning activities pursued to increase knowledge and skill for current or future roles), or special project goals (related to specific initiatives or unique opportunities).
STEP 2: Allow Yourself to Dream

Imagine the ideal under the focus area you chose. Think big and do not immediately dismiss ideas because of perceived limitations or uncertainty. Give yourself time to brainstorm. A helpful practice for this step is to consider what you’re passionate about or particularly interested in related to this area.

Ideally… _____________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________

STEP 3: Define the Desired Outcome

Identify what you want to achieve and define the intended outcome. Think in positive terms, not negative so that the outcome is motivating – e.g., “I will improve my health.” vs. “I will stop smoking.” This step answers the question, “What will success look like?”

___________________________________________________________________________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________

STEP 4: Consider the Details

Reflect upon what might influence your success with the effort. That is, consider what will be needed to achieve your desired outcome.

What skills and knowledge will I need to acquire in support of this effort? _____________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________

How can I gain these skills and knowledge? _____________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________

What are the potential obstacles to success? _____________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________

How can I overcome these obstacles? _____________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________

Success is dependent upon what other things, circumstances or people? _____________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________

What level of control or influence do I have other those things, circumstances or people? _____________________________________________
___________________________________________________________________________________________________________
___________________________________________________________________________________________________________
How will I measure my progress and success?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Do I feel that success is realistic with hard work and determination?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Reflecting upon all of the considerations above, am I committed to pursuing this effort, at this time?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

STEP 5: Identify Supporting Tasks

Define the tasks/actions that need to be handled in order to achieve success. Incorporate contingency plans for obstacles that may arise. Once individual tasks are identified, put them in the order (#1, #2, #3…) in which they need to be completed.

<table>
<thead>
<tr>
<th>Task/Action</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(see Step 6)

STEP 6: Assign a Timeframe

Define a reasonable period of time in which the effort can be achieved. Identify a beginning date and an end date for the overall effort, as well as defining a deadline for individual tasks that need to be completed (see last column in Step 5 above).

Goals without specific deadlines tend to get bumped by day-to-day demands and miscellaneous requests. Assigning timeframes and deadlines helps to maintain focus and momentum, and keeps progress moving.

I plan to start working on this effort on ___________________________. (specific date/month/quarter, etc.)

I plan to achieve this effort by ___________________________. (specific date/month/quarter, etc.)
STEP 7: Finalize Your Goal

When finalizing your goal, you want to be sure it’s effective. Some goals are good – even admirable – but not effective. Ineffective goals are often ambiguous, unrealistic, or unrelated to key priorities. To set effective goals, a useful acronym to remember is S-M-A-R-T.

Specific
An effective goal should clearly define what one intends to do. Write the goal with “what,” “when,” and “how” in mind. Remember, use positive (not punitive) language so that goal is motivating and inspiring.

Measurable
An effective goal should define how progress and outcomes will be evaluated. Measurements can be qualitative (numbers, percentages, dates, costs, ratings, times) or qualitative (descriptive attributes or toggled responses like yes/no, complete/incomplete, within/over budget).

Attainable
An effective goal should encourage growth, but should not be beyond ultimate reach or available resources. It should not be pursued at the expense of other priorities critical to success.

Relevant
An effective goal should add some level of value (i.e., create an opportunity, respond to a need, address a priority, etc.) and should support the individual's interests or the organization's mission.

Time-based
An effective goal should have a defined timeframe. Setting deadlines can motivate employees and help maintain an appropriate pace of work. Deadlines must be realistic, however, and be developed with consideration of the constraints by all contributing parties.

It's important to write your goals down because it makes them real and tangible. Use the below model to write your goal statement. (Note: The information needed to complete this model has already been defined by you in earlier goal setting steps.)

I will (Specific achievement) ____________________________________________

by (Time-based date) _________________________________ . To accomplish this, I will (details on Specific tasks & timeframes)

____________________________________________________________________________________

____________________________________________________________________________________

I will measure my success by (Measurement) ____________________________________________ .
STEP 8: Pursue Your Goal

Follow your action plan and visualize success with your goal. Be flexible and make adjustments as needed – don’t use emerging challenges as reasons to abandon your goal. Likewise, don’t get discouraged when things arise that impede your progress – stay focused and persevere! Celebrate success along the way… each task completed is a step closer to realizing success!

Final Thoughts…

You are the CEO of your own life.
You are responsible for your own success. The only person who owes you anything is you – you owe it to yourself to identify how you want to use this life and to take the steps needed to accomplish it. No one has more power or influence in how your life will unfold than you.

There’s a connection between believing in your success and achieving your success.
You are what you think because your thoughts drive your action. If you think that you are capable, you greatly increase your chances of accomplishing things because you have the motivation to act. In contrast, if you think that you are incompetent, you will likely not bother to extend any effort. Thus, it’s critically important to be confident in your ability to accomplish your goals. After all, if you don’t believe in yourself, why should anyone else?

Successful people aren’t lucky.
By and large, those who achieve success do so more through hard work than luck. They do not wait for stars to align, they take action. They do not wait to see how things will go, they make decisions. They do not gamble on external circumstances, they bet on the impact of their own abilities.

You do not have the right to say that something is impossible until you have attempted it.
Look at your world. Some of the greatest inventions like the light bulb, airplane, camera and computer, each originated with a single attempt. And it’s more than just things – diseases have been cured and peace has been achieved by the action of mere individuals. None of us really know what we can accomplish… until we try.

Tunnel vision can be beneficial.
Successful people have tunnel vision in the sense that they can’t imagine anything but achievement – that is their focus. They visualize themselves reaching their goals. They expect things to work the way they envision and they fill their minds with positive messages that affirm their belief. Their “can do” attitude eliminates room for doubt and focuses attention only on the possibilities.

Failure and success are related.
On the path to success, you are bound to make mistakes. Successful people make many mistakes – and some of them are huge. However a mistake doesn’t necessarily equal failure. Successful people use each mistake as a learning opportunity and a chance for improvement. They aren’t afraid to fail. They realize that reward comes with risk, and they know that risk levels decrease as knowledge and experience increase. Wisdom does not come from being flawless. It comes from learning, adapting and growing as a result of a challenge. So be grateful for your mistakes – if you learn from them, they will get you even closer to success!

Being successful is easier than you think.
Is it easier to get to an unfamiliar location when you use a map or GPS? Is it easier to make a delicious entrée when you have a recipe? Success in life is no different – it’s easier to achieve when you take the time to figure out what it is that you want and identify the steps needed to get there. Defining a plan not only shows you where to direct effort, but it also shows you where your energy would be unproductive. It provides a clarity that you would otherwise not have.

“The world makes way for the man who knows where he is going.”
- Ralph Waldo Emerson

Optima Health
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do we desire the outcome to be?</td>
<td></td>
</tr>
<tr>
<td>What mission or strategic objective will that outcome support?</td>
<td></td>
</tr>
<tr>
<td>By when do we need to produce the outcome?</td>
<td></td>
</tr>
<tr>
<td>What, specifically, is needed (e.g., knowledge, abilities, skills, resources – staffing, funding, equipment) for success in achieving the outcome?</td>
<td></td>
</tr>
<tr>
<td>Which of these knowledge/skills/abilities/resources do we have to develop in order to achieve the outcome?</td>
<td></td>
</tr>
<tr>
<td>Is achievement of the outcome dependent upon things beyond us?</td>
<td></td>
</tr>
<tr>
<td>If so, to what extent (low, moderate, or high degree) is the dependency?</td>
<td></td>
</tr>
<tr>
<td>What are potential obstacles that might impede progress or prevent achievement of the outcome?</td>
<td></td>
</tr>
<tr>
<td>What is the probability (i.e., low, moderate or high probability) that these potential obstacles will be encountered?</td>
<td></td>
</tr>
<tr>
<td>What support can be secured to prevent or handle potential obstacles?</td>
<td></td>
</tr>
<tr>
<td>Is the outcome within our power (i.e., influence or control) to realistically achieve?</td>
<td></td>
</tr>
<tr>
<td>How will we know we are making progress toward the outcome?</td>
<td></td>
</tr>
<tr>
<td>Will pursuit of this outcome have a negative impact on any other goals or priorities for which we are responsible?</td>
<td></td>
</tr>
<tr>
<td>Considering everything that pursuit of this outcome might entail, do we believe we can achieve it?</td>
<td></td>
</tr>
<tr>
<td>Do we believe it’s the appropriate time to pursue it?</td>
<td></td>
</tr>
</tbody>
</table>