



2022

GOAL SETTING WORKBOOK

Personal Edition



PLAN FOR YOURSELF IN 2022

It's a new year, and a new opportunity to plan for success. Success in life, both personally and professionally should be intentionally planned. We believe the more intentional we are with what we want to accomplish, the higher likelihood of achieving our goals. This book will provide you the template for developing your plan.

Goals:

A goal is the desired result that you seek to achieve because of implementing strategies and intentions. A goal:

- ◆ Defines the destination
- ◆ Changes the direction or mindset to move towards a new destination
- ◆ Creates the necessity to develop specific tactics

Strategies:

Often confused with goals, strategies are the building blocks/stepping stones to achieving a goal. Strategy, which is derived from ancient Greek for "generalship," is the method or plan that is executed to bring about a desired future, the goal. Strategies are the specific projects or tactics to get from where you are to where you want to go.

In the planning process, we recommend you work 90-day strategies. There is no limit to the number of strategies, but recommend no more than 3 every 90 days. Keeping in mind that 3 every 90 days is a total of 12 strategies for the year. Consider your bandwidth and resources before the plan is finalized.

Action Items:

Stated simply, this would be the step-by-step actions or activities that must take place for a strategy to be implemented. A list of action items should be identified and then organized in the order they should be executed.

All the best to you and have a terrific 2022!





LET'S GET
STARTED

BOOST YOUR AWARENESS

2021 SELF EVALUATION.....

Be honest with yourself in reviewing your department strategies, challenges and successes in 2021.

1. What was a success from last year that you are proud of?

2. What was a challenge from last year, and is that still a challenge today?

3. What strategy and/or improvement did you implement last year and what were the results?

4. What did you hope to accomplish but did not this past year, and why?

SETTING PLANS FOR 2022.....

Looking at the future and making a plan takes commitment and focus. Be honest with your intentions.

1. What are 3-5 of your personal values?

2. What are your key priorities and how will you time-block for them?

3. What are your professional intentions for 2022?

4. What are your personal intentions for 2022?

5. What will be your daily/week habits to achieve your plan?



RAISE YOUR GAME

MAKE YOUR PLAN FOR THE 5 KEY AREAS IN YOUR LIFE

PROFESSIONAL · HEALTH · LEARNING
FINANCES · RELATIONSHIPS

1. Determine goals for the 2022 year. Set 1-3 strategies for each goal every 90 days
2. Identify the action items necessary to implement your strategies
3. Evaluate your progress every 90 days, make adjustments, and plan your next 90 days

PROFESSIONAL GOALS.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

PROFESSIONAL GOALS.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

PROFESSIONAL GOALS.....

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PROFESSIONAL GOALS.....

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GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

HEALTH & WELLNESS.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

HEALTH & WELLNESS.....

90-Day Time Frame: _____

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GOAL:

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HEALTH & WELLNESS.....

90-Day Time Frame: _____

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HEALTH & WELLNESS.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

INTELLECTUAL & LEARNING

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

INTELLECTUAL & LEARNING.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

INTELLECTUAL & LEARNING.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

INTELLECTUAL & LEARNING.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

FINANCIAL SECURITY.....

90-Day Time Frame: _____
Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

FINANCIAL SECURITY.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

FINANCIAL SECURITY.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

FINANCIAL SECURITY.....

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

RELATIONSHIPS & BALANCE

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

RELATIONSHIPS & BALANCE

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

RELATIONSHIPS & BALANCE

90-Day Time Frame: _____

Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

RELATIONSHIPS & BALANCE

90-Day Time Frame: _____
Enter Dates

GOAL:

Strategy #1:

Strategy #2:

Strategy #3:

Action Items:

List of Strategies to Implement into Personal Development & Wellness Plan:

HEALTH & WELLNESS	<ol style="list-style-type: none">1. Set a consistent schedule for daily exercise, committing to move my body every day.2. Make my health a priority, including making appointments for wellness checks and testing, to ensure I'm providing myself and my family the healthiest version of me.3. Commit to start or continue an exercise regimen and food plan that is realistic and improves my overall health.4. Join a sports team/league to get into physical shape and expand or maintain competitive team interactions.5. Explore mental health needs for myself and my family, pulling in support where needed.6. Determine the right work schedule for me and stick with it. Meaning, when I do what, when I start and end, where I do my best work, when I take breaks, etc. – to ensure I am achieving my professional and personal goals.7. Work on better sleep habits to improve my health – by managing my routines, schedule, and patterns.8. Give something up. Evaluate a bad habit, practice or spending habit to eliminate this year, come up with a plan for success and replace my bad habit with a positive one.
LEARNING & INTELLECT	<ol style="list-style-type: none">9. I will increase my learnings and skills by dedicating ± 3 hours per week engaging with online learning resources – such as podcasts, audible books, online courses, and other knowledge-based resources.10. Read ± 12 books in the year (at least one book per month).11. Learn something new. This could be either in work-life or personal life. Carve out time each month to dedicate towards this new skill or learning.12. Start a blog or journal weekly writing practice. Capture things such as: dreams, memories, history, gratitude, human interactions, or other thoughts and intentions.13. Schedule time every day/week for personal meditation, reflection and learning.

Strategies to Implement into Personal Development & Wellness Plan CONT:

FINANCIAL SECURITY

- 1. Set a monthly budget and commit to keeping it
- 2. Obtain a copy of my credit report and correct any errors, then use the report to build a plan to begin paying down debt. I will pay off \$_____ monthly.
- 3. Increase my overall savings & investments by committing to save ± 10% of my earnings.
- 4. Determine a minimum of three financial goals (i.e., saving for a down payment, purchasing a car, or investing) including likely roadblocks, as well as actionable steps required to meet my goals.
- 5. Dedicate myself to creating work-life harmony by diligently ensuring there is time every day to feed myself professionally and personally.
- 6. Work as a household to declutter or organize our home. Donate excess when possible or dispose of broken or obsolete items.
- 7. Tend to personal relationships, carving out ____ hours per week to touch base, connect, and reinforce the importance of those relationships.

RELATIONSHIP & WORKLIFE BALANCE

- 8. Pledge to eating dinner as a family (whatever family means to you) at least ____ times per week.
- 9. Allocate ____ hours per week for one-on-one time with my spouse, partner, and children doing something that connects and brings us peace. This can be going for a walk, sitting down for an uninterrupted coffee break, starting a new hobby together, or anything else that we find enjoyable.
- 10. Plan, save for, and take that dream vacation with those I love.
- 11. Commit to, or enhance, my involvement with a charity or cause that matters to me via donations or volunteering.
- 12. Join a club, community, or networking group to establish new friendships and/or build connections that can provide an opportunity to advance professionally.
- 13. Bring a pet into the household this year.
- 14. Get my financial house in order by setting up a personal will or trust this year.

NOTES



NOTES



CREATING EXPERIENCES THAT MATTER

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