

Setting Obtainable Goals

East Bay Entrepreneur and
Small Business Meetup
January 7, 2008

What do you want?

- Get a pen and paper
- Create categories for the areas of your life where you would like to see some changes
 - Example: Family, Business, Pleasure
- Identify at least 5 wants in each area, in no particular order
 - It's best to brainstorm this list

What do you want?

Example of categories and goals

- Goal Categories: Family, Business, Personal
 - Family
 - Spend more time with sister
 - Improve relationship with cousins
 - Start a family activity
 - Have family dinner at least two weeknights
 - Help Grandmother
 - Business
 - Make more money
 - Bigger office space
 - Improve organization
 - Hire new employee
 - Change to electronic bookkeeping
 - Personal
 - Lose weight
 - Read more
 - See friends more often
 - Donate money to a good cause
 - Meet more people

What do you want?

- On a separate piece of paper, pick the top priority in each category you identified
 - This step can be difficult because there are specific goals, such as hire a new employee, versus vague goals, such as make more money.
 - Vague goals, such as make more money, often seem less obtainable simply because they are vague
 - In addition, some goals seem urgent, even though they may not be.
 - To help identify the top priority for you, select the item that will have the largest effect in the direction in which you want to go, regardless of factors such as specificity, urgency or perceived obtain-ability.

What do you want?

Example of top goal in each category

- Family: Have family dinner at least two weeknights
- Business: Make more money
- Personal: Lose weight

What do you want?

- Prioritize the top pick for each category
 - Example:
 - Goal #1 Have family dinner at least two weeknights
 - Goal #2 Make more money
 - Goal #3 Lose weight
- Clarify each goal with specific details on each:
 - Purpose
 - Motivation
 - Specific steps/tasks necessary
 - Milestones
 - Monthly
 - Weekly
 - Daily
 - Deadlines
 - Implementation
 - Completion

Example of Clarifying Goal #1

- Have family dinner at least two weeknights
 - Purpose – to spend more time with immediate family to improve relationship with each person and create a closer knit family unit.
 - Motivation – I want to improve my, and my family members, quality of life
 - Specific steps/tasks necessary
 - Milestones –
 - More cohesive environment when together
 - Voluntarily spend more time together
 - Monthly – Discuss how eating dinner together more often has affected each participant
 - Weekly –
 - Involve each family member in planning the dinner for the next week
 - Ensure the family dinner schedule fits in everyone's schedule
 - Create a weekly checklist (buy food, id who will pick the meals, pick both meals, id who will set the table, id who will clear the table, create checklist for next week, verify checklist is complete with family, check family schedules, etc.)
 - Daily – Complete at least one item from the weekly checklist
 - Deadlines – A NOTE ABOUT DEADLINES

A NOTE ABOUT DEADLINES WHAT ARE YOU WILLING TO GIVE UP?

- Deadlines are based on your perception of:
 - The effort required to complete each task
 - The time required to complete each task
 - The number of items involved in completing each task
 - Always try to break each task down to as few items as possible – this creates a positive encouraging environment on the road to your goal because it enables you to experience more successful accomplishments
 - For example: “Ensure the family dinner schedule fits in everyone's schedule” could be a single task, or there could be a single task for each person – recommended. When it has been confirmed that the dinner schedule fits in everyone's schedule (for a family of four) you will have successfully completed four tasks instead of just one.

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 - Daily – Complete at least one item from the weekly checklist
 - Deadlines – A NOTE ABOUT DEADLINES
 - Implementation, tasks and completion
 - Create the weekly checklist: 1/7/08
 - Have family review/revise/edit checklist: 1/8/08
 - Complete/post and begin implementing checklist: 1/9/09
 - The dates above are an example of only one task of the seven identified for this goal.
 - *Deadlines should be the most specific component of your goal setting.*
 - **These dates are ambitious, as dates for your highest goal priority should be!**

Example of Clarifying Goal #2

- Make More Money
 - Purpose – get out of debt, stay ahead of bills, increase material lifestyle and grow business
 - Motivation – I want to improve my, my family members, and employees quality of life
 - Specific steps/tasks necessary
 - Milestones –
 - Experience double current net income
 - Maintain net income to expense ratio while increasing expenses
 - Monthly –
 - Obtain 4 new clients
 - Increase sales 10% per existing client
 - Weekly –
 - Obtain one new client
 - Try one new marketing technique
 - Daily –
 - Call 5 existing clients and ask for referrals
 - Create call list for next day
 - Deadlines –
 - Implementation, tasks and completion
 - Daily-
 - Create first call list: 1/7/08
 - Complete calls: 1/8/09
 - Create call list for 1/9/09: 1/8/09
 - Weekly-
 - Identify one new marketing strategy and associated tasks: 1/9/09
 - Task 1: 1/10/09
 - Task 2: 1/11/09
 - Completion of new strategy implementation: 1/16/08

Ensuring Success

- At the end of a week:
 - Look at your daily goals
 - Assess what percentage of your daily goals you met
 - Assess whether or not your daily successes lead to obtaining your weekly goals
- If yes, you may want to refine your daily goals to improve your success ratio
- If no, you may need to reset your daily goals; they may have been unreasonable or ineffective toward meeting your larger goals

Ensuring Success

- At the end of a month:
 - Look at your weekly goals
 - Assess what percentage of your weekly goals you met
 - Assess whether or not your weekly successes lead to obtaining your monthly goals
- If yes, you may want to refine your weekly goals to improve your success ratio
- If no, you may need to reset your weekly goals; they may have been unreasonable or ineffective toward meeting your larger goals

Ensuring Success

- Work with other people to set, achieve and review your goals
 - Talking to others about your goals will help keep you accountable
- Associate with people who have achieved the goals (or similar goals) to those you are pursuing

Questions?

Thank You!

Carissa Goldner, Owner
Synergists International
(877) 254-9146