



Plan to succeed:

A 6-step goal setting worksheet

Where are you now and where do you want to be?

How can you get there?

How will you measure and track success?

STEP 1: What do you want your future to look like?

Take 15-30 minutes to imagine your future. Find a comfortable, quiet, distraction-free space and ask yourself the following questions to create a picture of what your ideal future looks like.

- ▶ Who are you working with? _____
- ▶ What field are you in? _____
- ▶ What type of job do you want to have? _____
- ▶ What is your personal life like? _____
- ▶ Who do you admire or look up to? _____
- ▶ What activities and pursuits fill your time outside of work? _____
- ▶ How do you give back to your family, friends, community or the world?



Understanding what you want **your future** to look like will help you choose **your goals**.

STEP 2: What are your interests and what do you want to achieve?

Just as understanding what your ideal future looks like helps you to set your goals, so does better understanding what your interests are and what you'd like to achieve.

Assess your current mindset & personal attributes

1. Where do you spend most of your time & energy? The answer to this will help you understand your current priorities.

2. What are your personality strengths? This will help you understand personal areas you may enjoy developing further.

3. What is your dream job?

What is your current level of education?

1. What is the highest level of education you've achieved? Is there another level of education that you would like to complete?

2. Have you ever thought about pursuing higher education or going back to school and continuing your education?

3. Are there any classes, subjects or skills that really interest you?

Determining your desired overall outcome

Broadly speaking, there are usually four types of outcomes people are trying to achieve when it comes to professional development.

They include:

1. **Discovering a career path.** This is primarily for people who are starting off but are not sure where to begin.
2. **Advancing in your current career.** This path is typically for people who want to level up professionally, move up in their organization and/or lead teams.
3. **Earning a higher salary.** This path is for people who are looking to earn more money in their existing career or by starting a new one.
4. **Changing career paths.** This path is for people who have experience in a certain area and now want to move into a different career that may or may not be relevant to their previous experience.



The more consideration you can give to uncovering what you want to accomplish most and why, the **easier it will be to plan for your future.**

STEP 3: Choose your goals

Choose three goals — one that is personal, one that is professional and one that is related to learning. We recommend that you start by setting a personal goal first because it often helps you understand and choose the professional and learning goals that will help you achieve your personal goal(s). In other words:

Your learning goal will help you to achieve your professional goal, which will help you to achieve your personal goal, ultimately getting you closer to the future you envision for yourself.

Make sure that all three are SMART goals. Check each goal against the SMART guidelines below. Adjust your goal so that it meets each SMART criteria.

Personal Goal:

Example: Buy a house that's comfortable for our family in a neighborhood with schools we like.

Career Goal:

Example: Become a manager at work so that I'm more challenged and can earn a higher salary.

Learning Goal:

Example: Earn a business degree with a focus on classes that will help me to become a manager.

- ✓ **Specific**—significant, simple
- ✓ **Measurable**—meaningful, motivating
- ✓ **Achievable**—attainable
- ✓ **Relevant**—reasonable, realistic, results-based
- ✓ **Timely**—time-based, time/cost-limited, time-sensitive

Achieving the future you want...



With goal setting, it's best to **start where you want to end up!**

 **Now it's your turn!** Add your answers to the prompt below.

Personal Goal:

Professional Goal:

Academic Goal:

Specific—significant, simple

Measurable—meaningful, motivating

Achievable—attainable

Relevant—reasonable, realistic, results-based

Timely—time-based, time/cost-limited, time-sensitive

STEP 4: Make your plan

In order to accomplish your goals, it helps to make a step-by-step plan to get there. Each small step gets you closer to your goal. Complete the process below for each of your goals.

Step	How to start	How to finish	Deadline to complete
<i>Example:</i> Research 3 skills that you need to get to the next level of your career	Meet with your manager to discuss options for developing these skills, either on-the-job or through additional education	Review the plan with your manager and take action towards next steps	2 weeks from today
<i>Example:</i> Explore skill-building program options that interest you and align with your career goals	Submit a request for information for the skill-building program(s) you're interested in	Review the information and begin planning a timeline for when and how to enroll	3 weeks from today

 **Now it's your turn!** Add your answers to the prompt below.

Step	How to start	How to finish	Deadline to complete

STEP 5: Map your path

As you tackle your plan, you will need help to complete each step and overcome challenges along the way. Identifying these points ahead of time will help you maintain steady progress.

Resource(s) or help needed	Anticipated challenges or blockers	Who / what can help me succeed
<i>Example:</i> Help staying on track toward my goals	Being busy at work & at home, & getting distracted from my learning goals	Share my goals with my manager or mentor to help me stay accountable
<i>Example:</i> Help taking care of the kids and the house so I have time to focus on my coursework	Not having enough time to study or getting distracted by the kids	Create a sample weekly coursework schedule to see how education can fit into day-to-day life

 **Now it's your turn!** Add your answers to the prompt below.

Resource(s) or help needed	Anticipated challenges or blockers	Who / what can help me succeed

STEP 6: Choose what success looks like

As you think about your future, what does success look like for you? Identifying what success looks like will help you know what you're working toward and when to celebrate the progress you've made.

- ▶ What do you want to achieve? _____
- _____
- ▶ How do you measure success? _____
- _____
- ▶ What will you have accomplished? _____
- _____
- ▶ What changes when you achieve your goals? _____
- _____

With a SMART start, any goal is achievable!