

Setting Significant Goals

Imagine, Focus, Describe, and Refine Your Goals to Attain Success

Rick Coplin

Introduction

This Goal Setting Workbook is one I am using to set my own goals. It is a companion to a blog post entitled: [6 Lessons From Goal Setting For The First Time Ever](#) published at [RickCoplin.com](#)

I began my own goal setting in December 2013 after signing up for Michael Hyatt's goal setting course 5 Days to Your Best Year Ever. This course and the community of goal setters that emerged around the course have been exceptionally helpful to me in setting and attaining my own goals. I highly recommend [Best Year Ever](#). The course will open to new members in the latter part of each year.

I hope you are able to make use of this template and set meaningful goals that make a difference in your life and/or in someone else's life. Drop me a note in the comments section of [6 Lessons From Goal Setting For The First Time Ever](#) and let me know how it goes.

Rick

NOTE: The backdrop image for this workbook is a picture of a 200 year old barn on our family farm.

Imagining Your Goals

Instructions:

1. Set aside time today to start developing your goals. Invest 15-30 minutes each day for several days, until you are comfortable your goals clearly represent you.
2. On the following pages, describe each goal and how you will accomplish them keeping the SMARTY acronym in mind:

SMARTY Goals:

Specific - Write down exactly what you want to accomplish.

Measurable - Quantify so you can measure progress and completion.

Actionable - Start with and use action-oriented verbs in your descriptions. Each time you review it, subconsciously you will want to take action.

Realistic - Make sure each goal is attainable, even if you don't know how to accomplish it when you write it down. The best goals challenge us to leave our comfort zones. Make sure they are reachable with determined effort.

Time-Bound - Goals without dates are only dreams. Create deadlines that are thoughtfully spaced across each quarter and/or the year. Putting deadlines together, too soon or too far off is a recipe for failure.

Y – Determine why you have a goal and why it is important to you. Clarity will help you evaluate your goals and progress against priorities throughout the year.

Focusing Your Goals

Instructions:

- Review the potential Focus Areas listed below. Which ones are most important to you right now or for the next 3-6 months? Circle 2-3.
 - Limit yourself to a few key focus areas, particularly if you are a goal setting novice. Too many Focus Areas will lead to a *lack of focus*, and you will struggle to achieve your goals.
 - You may think of other categories more important to you than these listed. By all means, use Focus Areas that have significance for you.

Potential Focus Areas:

Physical	Spiritual	Financial
Success	Family	Health
Service	Gratitude	Relationships
Nutritional	Lifestyle	Career
Education	Artistic	Attitude
Personal Growth	Recreation	Others...

Describing Your Goals

Instructions:

4. Write your goals using the worksheets on the following pages. SMARTY reminders are included for each statement to reinforce what is important in that statement using the SMARTY approach.
 - In your first pass, don't worry about specific wording, just start writing down what is important to you and what you would like to accomplish.
 - Think through how each goal can be measured. How will you know you have made progress or accomplished a goal?
 - What do you need to do to pursue this goal? Remember to use action oriented verbs throughout.
 - Write down that you can accomplish this goal and some notes about how realistic it is to reach.
 - Assign dates for completion. Also think about dates for marking significant progress.
 - Write why it is important to you to reach this goal. What is the impact it will have on your life?

Specific

Measurable

Actionable

Realistic

Time-Bound

Y Why it is important

Describing Your Goals

Goal # _____:

1. My goal is focused on _____.

2. My goal is (**S** + A,R):

3. I will know I have accomplished the goal by (**M** + A, R):

4. To accomplish this goal I will need to (**A**, R):

5. This goal is realistic based on (**R** +A, T):

6. I will accomplish this goal by this date (**T** + R):

7. Significant milestones include these things by these dates (**T** +R):

8. This goal is important to me because (**Y**):

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Refining Your Goals

Instructions:

5. Refine your goals using the matrices on the following pages.
 - Use one page for each Focus Area.
 - Set 3-5 goals if you're a goal setting novice or you are setting goals for a period shorter than nine months.
 - Set 7-10 goals if you regularly set and achieve goals and/or you are establishing goals over a period longer than nine months.
 - Edit for clarity and simplicity so that your goals fit on the matrices.

6. Set specific times aside each week/month over the next 90 days to review progress and make adjustments. Use the check boxes to note that you have completed each review.

<input type="checkbox"/> Review Date #1: _____	<input type="checkbox"/> Review Date #6: _____
<input type="checkbox"/> Review Date #2: _____	<input type="checkbox"/> Review Date #7: _____
<input type="checkbox"/> Review Date #3: _____	<input type="checkbox"/> Review Date #8: _____
<input type="checkbox"/> Review Date #4: _____	<input type="checkbox"/> Review Date #9: _____
<input type="checkbox"/> Review Date #5: _____	<input type="checkbox"/> Review Date #10: _____
<input type="checkbox"/> Review Date #6: _____	<input type="checkbox"/> Review Date #11: _____

Refined SMARTY Goals

Specific - **M**easurable - **A**ctionable - **R**ealistic - **T**ime-Bound - **Y**

Focus	Specific Goal	Measurable	Actionable	Realistic	Date	Why

Refined SMARTY Goals

Specific - **M**easurable - **A**ctionable - **R**ealistic - **T**ime-Bound - **Y**

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Refined SMARTY Goals

Specific - **M**easurable - **A**ctionable - **R**ealistic - **T**ime-Bound - **Y**

Focus	Specific Goal	Measurable	Actionable	Realistic	Date	Why

Goal Setting Resources

Podcasts & Articles:

- [Michael Hyatt on Setting Goals](#) (RE Podcast #94)
- [Seven Principles for Setting Goals that Work](#) (MH)
- [The Beginner's Guide to Goal Setting](#) (MH)
- [The 10 Biggest Mistakes People Make in Setting Goals](#) (MH)
- [7 Apps to Help You Achieve Your Goals and Build New Habits](#) (MH)
- [How To Achieve More Goals](#) (RE)
- [Why You Don't Achieve Your Goals](#) [RE Podcast #83]
- [6 Lessons From Goal Setting For The First Time Ever](#)

5 Days to Your Best Year Ever:

These steps and the template are a high level approach to starting the process of goal setting. I recommend you follow this goal setting exercise as a trial. Then sign up for [Best Year Ever](#) when it reopens later this year. You'll get a much more comprehensive goal setting approach and have a community of like minded individuals with you.

Key: MH = Michael Hyatt; RE = Ray Edwards

About Rick Coplin



Rick has helped to build and sell a start-up company, directed technology programs in a major financial institution and consulted with companies throughout the United States in the areas of technology, finance, marketing and operations.

Rick currently is Vice President of Community Partner Ventures with [TechColumbus](#) working alongside entrepreneurs who are building start-up companies. In this capacity, Rick's role is to find, support, mentor, coach, incubate, and fund high growth potential companies in Central Ohio.

Learn more and connect with Rick on LinkedIn and other platforms [HERE](#).