

Goal Setting and Planning Workshop (Mini Version)

Each year millions of people traditionally make New Years resolutions, which by summer have been all but forgotten. There are those who stick to their resolutions, but what about everyone else? Why not consider developing New Years "Goals" and Developing a Plan around accomplishing these **goals**. Below is a Goal Workshop to help you develop your New Years Goals.

It is recommended that you take your time to complete each step. Complete steps 1-4 the first day and take a day for each of the following steps. If you desire, take the workshop with others. Necessary Items: Several pieces of Paper, Pencil/Pen, Magazine, Glue/Tape, 1-2 Sheets of 8½ x 11 Colored Construction Paper (Paper, pencil Magazine, Glue, Colored paper may be replaced with MS Word and PowerPoint/clip art). There are no right or wrong answers.

Workshop Steps:

1. Take one sheet of paper and individually "**List**" 6 Dreams/Goals. Do not number or place them in any order.
2. To the right of each Dream/Goal, "**Write**" a **time frame** to accomplish.
3. Now of these 6 "**Select**" the 3 that are the most important to you. In the left column place an "A" beside the most important one, then a "B" beside the next important one, and a "C" beside the next important one.
4. Take the items with an "A, B, & C" to the left of them and on a new line, "**Write**" measurable sentences. Example:

Old: A. Be debt free → by 2004

New: A. Be debt free by 12/31/04

5. You are now going to "**Develop**" each of these goals into steps for goal accomplishment. Use three separate sheets of paper. Take your goal identified as "Goal A" and write it at the top of a clean sheet of paper. List all the steps necessary for goal accomplishment (do not be concerned with order). Example:

Goal A: Be debt free by 12/31/06

- o Stop charging on my credit cards unless emergency
- o Combine credit cards into one low interest card
- o Take financial mgmt classes
- o Develop a personal budget
- o Fix credit/Get Payment Plans, etc.

Repeat this process for Goals "B" and "C". Please take your time when thinking about this. If necessary do Goal A, B, and C on separate days.

6. You are now going to place your itemized goal lists in "**Chronological Order**". Go to your detailed list for Goal A. In the left column, place a "1" beside what needs to occur 1st, "2" beside what needs to occur 2nd, etc. Steps can be revised as many times as necessary. Repeat this process for Goals "B" and "C". Example:

Goal A: Be debt free by 12/31/06

- (3) Combine credit cards into one low interest card
- (1) Take financial management classes
- (2) Fix credit/Get payment plans

7. You are now going to give yourself "**Deadlines**" for the items placed in Chronological Order. Take your measurable Goal Statement "A", its Chronological list of accomplishment steps and **assign** a date to "**complete by**" for each individual step. Repeat this process for Goals "B" and "C". Example:

Goal A: Be debt free by 12/31/06

- (1) Take financial management classes (**Deadline 04/19/02**)
- (2) Fix credit/Get payment plans (**Deadline 9/21/02**)

8. You are now going to add the deadline dates to your schedule. Add the completion dates identified in step 7 to your schedule. Do this for Goals A, B & C. If you use MS Outlook you may desire to create "Popup" reminders.
9. You are now going to create a "**Visual Daily Reminder**" for your "3" highest goals. Find a picture that embodies Goals "A", "B", & "C". Cut this picture out. Glue or tape this picture to your color construction paper. Beside each picture, write the deadline for goal accomplishment. Place your "Visual" goal collage at eye level on your refrigerator. **Note:** Some people find it beneficial to make multiple collages for additional locations (bedroom, work cubicle, etc.).