Free Printable Goal Setting Workbook

If you fail to plan, you're planning to fail.

Turning Goals Into Reality

Do you know the best way to set goals? Perhaps you've heard to start with daily tasks. These daily tasks add up and you reach your final goal. That's what I used to think.

Turns out I was wrong.

The best way is the *exact opposite*: start with the big goal and break it down into small steps. Below is a summary of the breakdown. I included an example of one of my goals to illustrate the process.

1. Long-term worksheet: define what your long-term goal is. And why it is important to you. The latter is important. Remembering your 'why' when things get tough will help you stay on track.

There is a SMART checklist to help you make your goal. Don't spend too much time on this…the SMART checklist can be helpful…but it can also limit you.

2. Potential problems/yearly breakdown: think ahead of things you might do to achieve this goal. Identify any potential problems and their possible solutions. You can also wait to do this until later when you've defined exactly what you're working on this year, quarter, or month.

Also breakdown your "big goal" into milestones. What you need to have achieved in 10 years (if your goal is that long), 5 years (if your goal is that long), and this year.

3. Quarterly Breakdown: Look at the quarterly breakdown worksheet. Write your major goal for this year at the top. Now, break it down into 4 milestones. Under each, write a couple of specific steps. The 2nd, 3rd, and 4th quarter don't need to be detailed. Just a general idea where you want to be.

4. Quarterly Planner: Examine your first quarter goal from the quarterly breakdown sheet. Now we're going to get specific. Write down **specific things** that need to be accomplished during each of the next three months.

If this is any time past the first quarter, there is also a section on the bottom to analyze how things went the previous quarter.

5. Monthly Planner: Plan out 2 to 4 **very** specific things that need done this month to reach your quarterly goals, in particular the items for "month 1" on the quarterly planner.

If this is any time past the first month, there is also a section on the bottom to analyze how things went the previous month.

6. Weekly Planner. Look at your monthly goals. Write down 2-3 specific things that need done THIS WEEK that will help reach your monthly goals. Remember, you don't need to complete your monthly goals this week!

Example:

1. One of my BIG GOALS is to not only have a thriving digital printable shop, but to also eventually have a physical planner out that focuses on more than just "planning." A planner that helps women achieve their goals and be the best they can be.

Long-term goal is to have a physical planner that helps with goal-setting. This is important to me because one of my fundamental purposes is "to help women be their best self. While doing the same myself."

My fundamental "why" is because I've spent so much of my life miserable. When I could have been happy had I simply applied what I knew and done the work!

2. *Potential problems/yearly breakdown:* I didn't worry about the potential problems because I'm going to focus on those later.

Breakdown:
10 years from now- physical product out and selling.
5 years from now- thriving digital store with a million in sales per year. Start research on physical product.
1 year from now- store professional and selling multiple products.

3. *Quarterly breakdown worksheet:*
> First quarter) Opt-ins for multiple products set up and done in a professional manner (including learning & implementing LeadPages). Store done in a more professional manner.
> Second quarter) Multiple products in store and selling.
> Third quarter) Aggressive marketing to sell. Read customer feedback, change products if necessary. Start planning for next year.
> Fourth quarter) Not sure yet.

4. *Quarterly planner:* Now, looking at the first quarter. While it's a lot to do, it isn't as overwhelming as putting out a physical product!
> In this case, I chose:
> -Opt-ins for multiple products set up and done in a professional manner. (Months 1-2)
>> -LeadPages purchased and set up.
>> -Sign up page for all opt-ins done in LeadPages.
>> -Tripwires set up for all opt-ins done in LeadPages.
>> -At least one new opt-in that is product specific.
> -Store done in a more professional manner. (Month 3)
>> -Research other stores and see what I want store to look like.
>> -Research themes.
>> -Implement new theme and get store set up.

5. *Monthly Planner:* Month 1 and 2 included a lot. For the first month (this month), I'm going to get LeadPages purchased and set up for EVERYTHING. I'll worry about the new opt-in during month 2.

> I already did a really good job on the quarterly planner of what needed done, which was:
>> -LeadPages purchased and set up.
>> -Sign up page for all opt-ins done in LeadPages.
>> -Tripwires set up for all opt-ins done in LeadPages.

6. *Weekly Planner.* Looking at my monthly goals, it's clear that LeadPages being set up is the first thing that needs to be done. So this month I'm purchasing LeadPages and learning how it works (including how to integrate it with my e-mail service and Shopify store).

Goals vs. Systems

This is a small section on mindset. The above goal-setting system works because it uses the following mindset.

One of the most important things I've learned is that just setting a **goal** and then focusing on that goal is fairly useless. Why? Because you exist in two states with a goal:

     1) You're either not there yet, hence frustrated that you're not getting "there" fast enough.

     2) You reach your goal (though 92% of people won't). What now?

The solution to this? Set up a **system** to reach your goals. Something you do regularly (ideally each day). If you're on track THAT DAY, you feel satisfaction. If you fall off track, you can get right back on the next day. And WHEN you reach your goal: you'll have already built the habits to make sure you don't lose progress. Or you can adapt your system to meet an even bigger and better goal.

Just remind yourself, every day, ***"System, not goal. The system is working today."***

I've read of this concept in multiple places over the last year. Books such as "Atomic Habit" to "The Slight Edge" are sharing this concept and how well it works.

And I can attest to that. If you want to learn more, see the post "Improve Your Life: Goals vs. Systems" located at: https://www.thehousewifemodern.com/blog/goals-vs-systems/

Long-Term Goal Worksheet

My long term goal is: (think big!)...

_____
_____
_____

WHY THIS IS IMPORTANT TO ME: _____
_____
_____

Keep asking "why" until you get down to the most fundamental reason you want to reach your goal.

Describe what your life will be like once you've achieved your goal:

_____
_____
_____
_____

SMART Checklist

These are general guidelines. Don't take fitting it into these guidelines too seriously. For example, while we want a goal to be attainable, we also want to dream big.
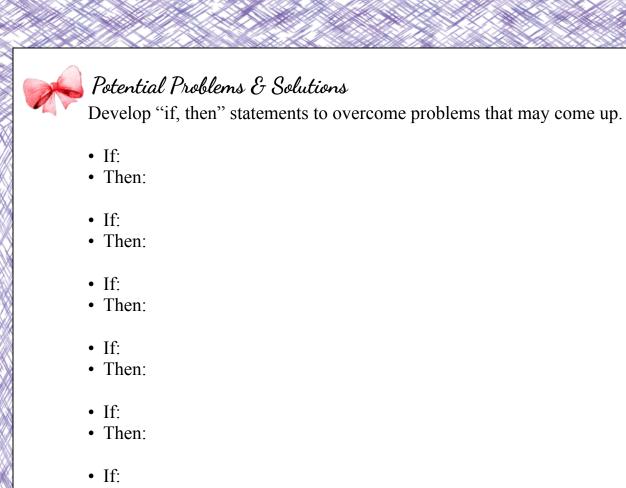
S- specific. Your goal must be clear. It must be well-defined. Vague or generalized goals are unhelpful because they don't provide direction. Remember, our goals are supposed to motivate us to specific action. We can't get from point A to point B if we don't know where point B is.

M- measurable. Include precise amounts and dates. Without a measure for success, you don't know when you've succeeded.

A- attainable. This one is a fine balance. We want a goal that is attainable-something we could actually succeed at. But we don't want to limit ourselves! You have no idea what you can achieve until you try.

R- relevant. Your goal should be relevant to the life you want to have. It needs to be relevant to your career, lifestyle, etc. This isn't to say you shouldn't try new things. But your goal to relate to your life.

T- time-bound. A date for completion helps keep urgency and keeps it front and center in your mind.

Potential Problems & Solutions

Develop "if, then" statements to overcome problems that may come up.

- If:
- Then:

- If:
- Then:

- If:
- Then:

- If:
- Then:

- If:
- Then:

- If:
- Then:

Breakdown

10 Year: _____
_____
_____

5 Year: _____
_____
_____

1 Year: _____
_____
_____
_____
_____

Quarterly Breakdown

Yearly Goal: _____

Quarter 1: _____
_____
_____
_____
_____

Quarter 2: _____
_____
_____
_____
_____

Quarter 3: _____
_____
_____
_____
_____

Quarter 4: _____
_____
_____
_____
_____

Habits you can develop to help reach goal:
-
-
-
-
-
-

Quarterly Planner

Month 1:

1._____

2._____

3._____

4._____

5._____

Month 2:

1._____

2._____

3._____

4._____

5._____

Month 3:

1._____

2._____

3._____

4._____

5._____

- How was the last quarter in terms of reaching your long term goal. Identify problems that arose and how to overcome them.

Monthly Planner

Specific Action Items to reach goal:

1. _____

_____

_____

2. _____

_____

_____

3. _____

_____

_____

4. _____

_____

_____

- How was the last month in terms of reaching your long term goal. Identify problems that arose and how to overcome them.

Week of: _____

ONE Thing:

Daily Schedule	Daily To-Do	Weekly BIG THREE
Sunday ___ _____ _____ _____ _____	☐ ☐ ☐ ☐ ☐	1. 2. 3.
Monday ___ _____ _____ _____ _____	☐ ☐ ☐ ☐ ☐	**Weekly To-Do** ☐ ☐
Tuesday ___ _____ _____ _____ _____	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐
Wednesday ___ _____ _____ _____ _____	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐
Thursday ___ _____ _____ _____ _____	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐
Friday ___ _____ _____ _____ _____	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐
Saturday ___ _____ _____ _____ _____	☐ ☐ ☐ ☐ ☐	☐ ☐ ☐