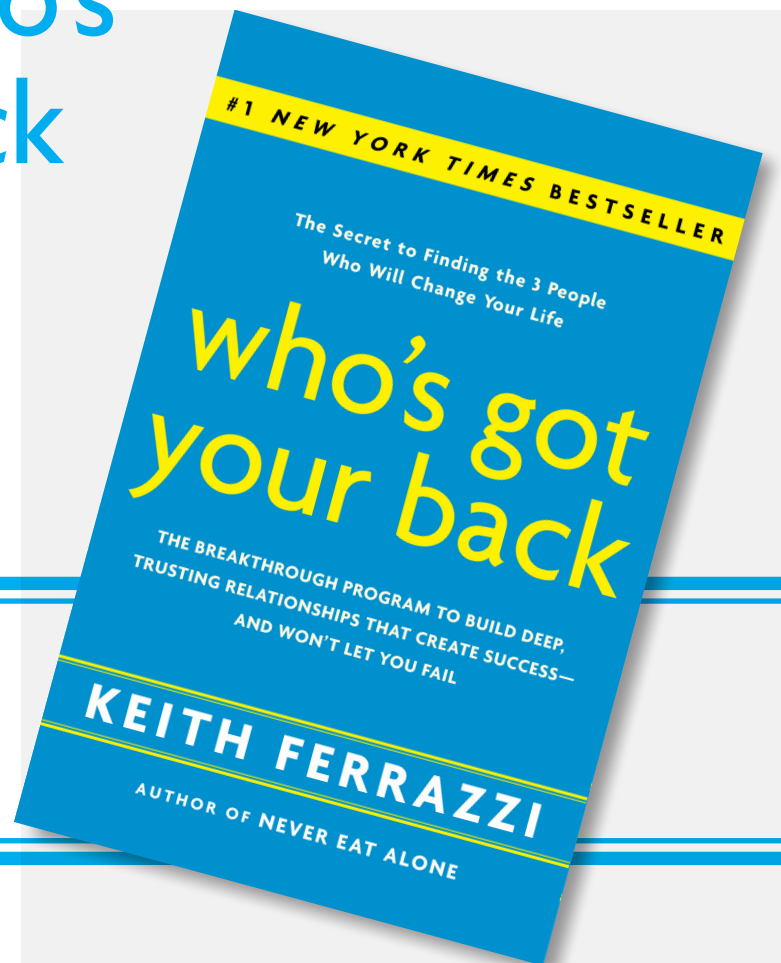


Goals Toolbox

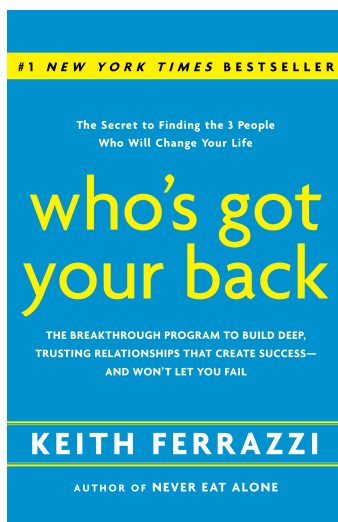
A companion
resource to Keith
Ferrazzi's Who's
Got Your Back



Goals Toolbox

People who have a clear picture of what makes them tick, who know their true inner motivations and priorities, simply don't get in their own way. They can focus with energetic intention on their goals. It's what allows ordinary people to live extraordinary lives.

Keith Ferrazzi, Who's Got Your Back



Welcome to the Goals Toolbox.

Face it: You're at a disadvantage in putting a mutual support team together if you don't have a coherent set of goals in mind. This workbook, one of the *Who's Got Your Back* companion resources, provides several of the tools to develop your thinking.

- I. A Tour of the Personal Success Wheel
- II. Articulating Your Vision
- III. Ready, set, GOALS
Performance and Learning Goals
S.M.A.R.T. Goals
- IV. Shifting from What to WHO
- V. Going Forward

I. Tour the Personal Success Wheel

The Personal Success Wheel defines the seven areas that together add up to a happy, successful life. Its primary use is to help you find ways you can help others – check out the Discover Your Currency download to learn more about that. But you can also use the wheel to get clearer on your own future needs and the goals you should set to satisfy them.



A Tour of the Wheel

Financial Success: Issues around money

Examples:

Increasing your earnings, paying off debt, saving or investment goals

Professional Growth: Issues around career

Examples:

Earning a promotion, learning a new skill, changing professions, or re-entering the workforce

Deep relationships: Issues related to your family, close friends, lifeline relationships, and romantic relationships

Examples:

Preparing to having a child, dating more frequently, or staying in closer touch with your parents

Giving back: Our philanthropic outreach—what each of us can do to contribute generously to others throughout our community and the world

Examples:

Tithing, making a commitment to volunteer weekly, becoming politically active

Spirituality: Exercising beliefs and participating in activities that take you outside yourself and connect you to a higher power

Examples:

Attending church regularly, spending time in nature, participating in a yoga retreat or home practice

Intellectual stimulation: New learning and experiences that stir the mind

Examples:

Learning to play an instrument, boning up on a new subject, daily Sudoku, travel to new destinations

Physical Wellness: Issues related to health, fitness, and prevention.

Examples:

Losing weight, quitting smoking, improving fitness, eating healthier

Tips:

- Sometimes in order to achieve in one area of your life, you need to change what you're doing in another area. For example, if you have a Professional Growth goal is to launch your own business, you might first need a Financial goal – saving a nest egg or improving your credit score to secure a loan.
- Oftentimes goals satisfy needs across multiple areas – for example you might pursue work for a green company or environmental nonprofit as a way of combining your Professional Development with Giving back.
- “Balance” doesn’t mean dividing your time equally across the seven areas. Think of balance as happening over the course of a life, and as being different for every person; depending on where you are in your journey, your focus will shift.

II. Articulate Your Vision

Now that you've toured the wheel, answer the questions below to begin to articulate your vision. Take some time to think independently, but also call upon friends and loved ones to discuss.

If you're unsure of some of the answers, just think of the exercise as a way to start exploring what you want. You're not bound to your answers – you can revise and amend as you focus your thinking over time.

1. What areas do you see in yourself that could be strengthened?
What knowledge, experience, training, and personal relationships do you need to get there?

2. What steps do you need to take to make sure you have no regrets at the end of your life and career?

3. What area of the wheel do you think most needs your attention right now and why?

4. Where do you want to be ten years from now in your career? In your life?

5. Three years from now?

III. Ready, set, GOALS

Once you have a solid grip on your long-term vision, shift your attention to concrete action by setting medium and short term learning and performance goals – and make sure those performance goals are S.M.A.R.T. (See the following pages for more on the different types of goals.)

1. Working backward from the 3 year goal you established in the last exercise, pick one feasible, achievable, and measurable 1 year goal.
2. Once you've determined your goal, designate what you will do to achieve that goal within the next 60 days, 6 months and a year. For each category, pick at least one performance goal and one learning goal. These are your milestones along the way to success.
3. Consider this worksheet as a starting place. Be prepared to discuss and refine your goals with your support partners.

My 1 Year Performance Goal: <hr/> <hr/> <hr/> <hr/>	
What I will do to achieve it:	
30 day performance and learning goals...	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
60 day performance and learning goals...	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
6 month performance and learning goals...	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Remember the two types of goals:

1. **Performance Goals** are quantitative goals that offer concrete, measurable parameters that define success.

Examples of performance goals:

- Lose 20 pounds by the time summer arrives
- Increase my sales by the 3rd quarter
- Find the love of my life by the time I'm 30
- Quit smoking within one year

2. **Learning Goals** are qualitative, mini-goals that define what you need to learn to help yourself achieve a specific performance goal. As long as you do the work, there's no way to fail at a Learning Goal.

Examples of learning goals:

- Learn the proper technique for at least three new toning exercises by June 1st
- Find and adopt at least two successful practices a mentor or expert has used to increase sales
- Commit to dating for one year and, after each experience, write down one thing you learned you want/need in a relationship and one thing you would rather do without
- Learn the psychology of addiction and note how/when I successfully replace old habits (smoking) with new one

When setting performance goals, make sure they are:

S = Specific

What is it, exactly, that you hope to accomplish? The more specific the goal, the more focused your efforts will be.

==> Not Specific: “Be more successful”

==> Specific: “Increase client retention by 20%”

M = Measurable

Can you measure your success? How?

==> With numbers? Percentages?

A = Achievable

Can you reach this goal? Setting goals too high only sets you up for disappointment.

==> Set smaller mini-goals if necessary.

R = Relevant

Will reaching this particular goal enhance your life? How?

T = Time-bound

Give yourself a deadline - otherwise you have a wish, not a goal!

Think of goal setting as a strategic plan for You, Inc. Take a personal lesson from the best companies, who know they need a team to figure out where they're going – no one person can do it alone.

Keith Ferrazzi, Who's Got Your Back

IV. Shifting from What to WHO

On the worksheet that follows, list 3 potential contacts who can help you achieve your 1-year goal – how do you think they can help? Ideally, do this exercise with your mutual support partners – they may be able to add to your list by making introductions. Or they themselves may be on this list!

These may be people you know already, or they may be people you need to meet.

Commit to launching your outreach plan to these contacts within 30 days time.

Remember, always approach contacts, especially new ones, with generosity! To figure out what personal currency you have to offer, consult the Personal Success Wheel download.

Person	How they can help	How you can help them
<p>Example: Margie Shellhouse</p>	<p>Has experience starting her own business; can give me a download on the paperwork I'll need to file with the city</p>	<p>Margie's a foodie; I'll have her to dinner at my house introduce her to a friend that's a chef</p>
<p>1.</p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	
<p>2.</p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	
<p>3.</p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	

V. Going forward

You're off to a great start – now, how to make sure that intention becomes sustained action?

Let others help! Try one of three options for enrolling others in helping you sustain your commitment:

1. Start a Greenlight Group, the ultimate mutual support tool! See *Who's Got Your Back's* "Do It Yourself" chapter and the free Greenlight Group Launch kit for details.
2. Find an accountability buddy! Ask a colleague or a friend to sign on as your mutual accountability buddy. Check in with each other weekly to make sure you've each taken steps toward accomplishing your goals, and to assign next steps.
3. No one in your circle who you feel comfortable asking? Make a new friend on the Greenlight Community (greenlightcommunity.com) to be your Accountability Buddy. That's what they're there for!