

Goal Setting Worksheet

A free template to help you define your goals
& create an action plan for achieving them.

Goal Setting Worksheet

Setting goals is an essential part of any career and is especially important in sales. Your goals tell you what you want to achieve in a certain timeframe.

Over the years, we've seen many professionals (and sellers and managers and companies) get goal planning, action planning, and commitment to execution right, and we've also seen many fall short.

Those who fall short tend to do so in three common ways:

1. Action plans to achieve goals are not concrete
2. Habits and behaviors to achieve different results are not outlined
3. There is no analysis of where time should be spent in order to achieve goals

To the first point, once you define your goals, you need a clear path to get there. You need to map out *how* you'll achieve your goals with a concrete action plan. Only when you're crystal clear on the actions you must take to reach your goal do you give yourself a fighting chance of achieving it.

Habit change is also an essential, yet rarely addressed, piece of the puzzle. If you keep doing the same things, you'll keep getting the same results. As Albert Einstein said, "The definition of insanity is doing the same thing over and over again, but expecting different results."

If you want to achieve your goals, you must do things differently. This requires changing your behaviors, and often changing bad habits that derail your focus, priorities, and, ultimately, your results.

Finally, you need to be mindful of how you spend your time. You need to spend your time on activities that are most likely to generate an outsized return. Once you choose where to spend your time, you need to avoid distraction and maximize your output per work hour.

5 Key Areas to the Goal Setting Worksheet

In this Goal Setting Worksheet, we focus on 5 key areas to not only set your goals, but also give yourself the best shot at achieving them.

1. Goal Setting
2. Action Plan
3. Habits to Change
4. TIME
5. Avoiding Distraction

On the following pages, we'll walk you through each of these sections and provide an example of a completed Goal Setting Worksheet. We suggest you [download the blank template](#) and begin to fill it in as you read about each section.

1. Goal Setting

As you think about your goals, break them down into big picture goals, three-year goals, and annual goals. Once you do that, you can break them down into your action plan with quarterly priorities, monthly objectives, and weekly and daily actions.

- **Big Picture Goal:** What's your big picture goal? What do you want to achieve over the long-term? It may be to retire at a certain age, to achieve a specific number for your net worth, or to open a specific kind of business or to have the flexibility to do what you want with your time and feel free.

This may not be easy to answer. Sometimes it takes weeks, months, or even years to sort out. It may also change over time. Don't feel pressured to come up with it today. Asking the question, however, will help you begin your journey to defining it.

- **Three-Year Goals:** Next, ask yourself, “What are my goals for the next three years?” Most people overestimate what they can do in the short-term and underestimate what they can do in the long-term.

While your big picture goal should be limited to one thing, you might have two or three three-year goals that will put you on your path to getting there.

- **Annual Goals:** This is where you’ll set specific targets for one year. For example, if you’re in sales, you’ll at least set a sales and income target. Even if you have a quota, you can set your personal goals to be whatever you want them to be. If you want to be a top performer, you often must reach a goal higher than your quota to get there.

Your annual goals don’t all have to be financial. You may want to develop a specific expertise, be considered for a promotion, or something else. Whatever they are, there should be no more than five annual goals and one should be indicated as your most important priority.

⚠ Take action: Go over to the Goal Setting Worksheet and start writing down your goals. This process is simple, straightforward and allows you to set your eyes on the prize.

If you work with a coach or manager, share your goals with them. A good coach can often provide insight to help you determine your goals. When you do this, however, remove any personal big picture or three-year goals, and focus only on the annual goals or those more focused on business.

2. Action Plan

Once you have your goals, it’s critical to lay out how you’ll achieve them. A strong focus on weekly actions—we recommend just 20 minutes per week planning them—will focus what you do and help you feel motivated to do it.

You can’t just go from annual goals to weekly goals. First, you must work out your short-term priorities.

- **Priorities This Quarter:** Build out your 90-day priorities. These are the linchpins that bring the goals framework together, bridging the gap between the long-term goals and the actions you're going to take right now to achieve them.

⚠ Take action: In your worksheet, list out three to five 90-day priorities. Keep the list as short as possible. Bold your most important priority.

- **Objectives This Month:** Next create your monthly objectives. These are things you need to do this month to work toward and achieve your quarterly priorities.

⚠ Take action: In your worksheet, list your monthly objectives. Be realistic about what is achievable. Bold the most important objective.

- **To Do This Week:** The next step is to break down the monthly list of actions into the big things you want to accomplish this week.

⚠ Take action: Break down your weekly to-do list by day and time. This is often a list of three to five core activities you're going to push forward.

- **To Do – Core List:** This is your catch-all. Maybe there's a report you need to produce for a manager, three run-of-the-mill sales calls on your calendar, a weekly internal sales meeting, a reminder to catch up with a teammate on an important opportunity, etc. This differs from the To Do This Week list in that it's typically the longer laundry list. By separating the two lists, you're forced to prioritize what's really important to get done.

⚠ Take action: Write down everything you need to do this week. If it's on this list, it may not directly contribute to your monthly objectives.

- **Greatest Impact Activity:** Your Greatest Impact Activity (GIA in the worksheet) is the one activity that, should you do it, will get you the greatest eventual return on your time investment.

Your GIA is rarely the easiest activity on your to-do list. It may be making 25 prospecting touches each day, brainstorming value-adding growth ideas for a specific account, or developing a big play to win a large new client. Whatever the specifics, it's the one activity that is most likely to help you make forward progress toward your goals.

⚠ Take action: Identify your GIA, add it to your worksheet, and put it first every day to make strides toward the long-term reward of achieving the career success you seek.

- **Sharing Your Actions:** This last piece is critical. Don't just plan your weekly actions, track them with someone who'll help you successfully achieve those objectives and hold you accountable.

We call this your accountability partner. Take a minute to type up your weekly plan and send it to your partner. Then, the next week, at a set time in your calendar, follow up with your partner. Indicate the activities you completed and which you didn't, and send along your plan for the following week.

This simple, three-minute practice can double your success rate in accomplishing what you want to get done each week.

⚠ Take action: Find an accountability partner who's willing to help keep you on track and provide honest feedback, and send them your weekly plan.

3. Habits to Change

You have to do things differently, and do different things, if you want different results.

You may know your goals and define your action plan for the week, but all is for naught if, when you start working, you're too easily derailed.

Maybe you're in the habit of checking your email first thing in the morning and responding to all of your messages. If so, you're not alone! Most people do this, and it's a productivity killer.


Maybe you like to read sports or news stories and you find yourself opening a web browser and mindlessly web surfing.

Maybe you're a slave to your phone and you feel the need to check your messages every time you hear that ding or buzz, or you simply pick it up constantly to check a series of applications.

Whatever the case, *you must change your habits if you want to achieve your goals.* Assuming you're conscious of the habits you want to change, you can intervene in several different places around the 4 Elements of Habit. You can change the (1) trigger, (2) thought, (3) response, or define and increase the desirability of your (4) reward.

1. **Trigger:** Something happens that cues a sequence of actions you tend to do (e.g., your phone buzzes).
2. **Thought:** The cue triggers a thought (e.g., "I should check the message").
3. **Response:** You take an action (e.g., you pick up the phone and check the message).
4. **Reward:** This is your gain or payoff (e.g., "Oh great, that report I'm waiting for is in. I'll stop what I'm doing and take a look").

If you want to change this or any other habit, you must change the trigger (turn off alerts), thought ("If my phone buzzes, I don't need to look at it right now"), response (keep working), or reward (achieving the priority for this week).

 **Take action:** *Identify the habits you want to change or begin that will help you achieve your goals. Write them in your worksheet. See the example Goal Setting Worksheet on page 10 for a few ideas.*

4. TIME

Achieving goals is all about spending your time on the right activities. You can think about your time in the context of the following four levels:

4. **Treasured:** Time you hold dear. This is where you want to get. It's spending time doing the things that make you happy. The key to maximizing happiness and fulfillment is taking Treasured TIME.
3. **Investment:** Time you focus on becoming more effective, getting the right things done, and achieving top performance. The key to achieving your goals is maximizing your Investment TIME.
2. **Mandatory:** Time spent doing things you feel you must do like commuting to work, shaving, mowing the lawn, filling out expense reports, attending certain meetings, etc. The key to Mandatory TIME is minimizing or converting it into Treasured or Investment TIME.
1. **Empty:** Time spent, nothing gained. The key to Empty TIME is to eliminate as much of it as you can.

Why are these levels important? If you want to achieve your goals, you must Obsess Over TIME. In fact, this is one of [The 9 Habits of Extreme Productivity](#) (click to download the white paper).

Most people waste a great deal of time in the Mandatory and Empty categories without realizing it. Identifying where you spend your time will go a long way to helping you realize where you can make changes that will ultimately help you achieve your goals.

⚠ Take action: Use the worksheet to track your TIME. For two or three days, obsessively track your time down to the minute. Once you know where you're spending your time, write down strategies in your worksheet to take Treasured TIME, increase Investment TIME, minimize Mandatory TIME, and eliminate Empty TIME.

5. Avoiding Distraction

Distraction is an epidemic. From co-workers to meetings to messaging alerts, there are 10 times more interruptions at work today than there were just five years ago.

If you want to achieve your goals, follow these tips to avoid distraction:

- **Be Impossible to Distract:** Play hard to get. When you're focusing, don't allow yourself to be interrupted. The first step is to recognize your distractions and then develop strategies for how to avoid them.

One constant distraction is technology alerts. Our advice here is simple, powerful, effective and (emotionally) difficult to do. **Turn off your alerts.** With alerts on, there's no way to avoid constant interruption. Turn off email, phone, social media, chat, and all other alerts. Take back control and make a conscious choice when you check alerts; don't let them control you.

⚠ Take action: In your worksheet, identify what distractions derail your focus and write down how you plan to avoid them.

- **My "To Don't" List:** If you have 42 priorities, you have none. With a colleague, manager, or coach, be brutal about your to-do list and say "no" to lower priorities.

When you say "no," it doesn't mean, "never." Instead, it means, "not right now." To capture these items, create a to don't list. Recognize them as priorities—priorities you're not getting to right now.

⚠ Take action: In your worksheet, move the priorities that you're not getting to right now to your "To Don't" list.

- **Maximizing Energy:** When you're tired, drained, or down, it's hard to focus and your results suffer. While time is finite, energy is not. It can be renewed and strengthened. Think about your energy across you mind, body, and spirit.

Now that you understand each of the components of the Goal Setting Worksheet, take some time to complete yours.

It's essential that you complete the entire worksheet. If you set your goals and action plan, but don't identify the habits you need to change or where you need to spend your time to achieve your goals, you are unlikely to be successful.

For some, this guide and worksheet are enough to help you get on the path to setting and achieving your goals.

If, however, you're serious about achieving your goals this year and want additional guidance and advice, consider our 90-day Extreme Productivity Challenge. It's available as an [online self-study program](#) for individuals, or an [onsite workshop that includes 90-days of coaching](#) for teams.

Either way, embrace the Goal Setting Worksheet and use it. Make it a part of your regular routine to review your goals, set your priorities, and develop your action plan. Tap an accountability partner to review progress weekly.

Do this and you're much more likely to not only achieve your annual goals, but also reach your long-term and big picture ones, all while living a happier, more fulfilled life.

[Click here to download an editable version of the Goal Setting Worksheet. >>](#)

Goal Setting Worksheet Example

Goal Setting

Big Picture Goal - My New Reality

Define the destination of your journey. Big picture, what do you want?

I want to retire in 12 years at 55 with enough money in the bank to enjoy my retirement and pay for my 2 children's college.

The Foundation - Why

Your "why" is the foundation of your goals and will help you stick to them long-term. Why have you chosen your big picture goal?

Giving back to my children, being around at 55 when they are still at home in school for several years, and being able to live free of debt or financial worry will allow me live a great majority of my life focused on giving back and enjoying Treasured Time every day.

Three Year Goals Between: 2019 and 2022

What do I need to achieve in 3 years that will put me on the path to achieving my Big Picture Goal?

Financial

- Retirement savings of XXX in 3 years
- Total compensation of Y

Strategic

- Positioned internally as the go to expert on the XYZ Technology
- Get promoted to Vice President of Strategic Accounts

Annual Goals Between: 2019 and 2020

List your goals for this year. Write down no more than five (as few as possible). Put your most important priority first.

Total compensation of Z at 120% of quota	<input type="checkbox"/> Behind	<input type="checkbox"/> On Track	<input checked="" type="checkbox"/> Ahead
Selling my first cross-functional deal at the enterprise level	<input type="checkbox"/> Behind	<input checked="" type="checkbox"/> On Track	<input type="checkbox"/> Ahead
Growing 3 of my accounts to over \$500k in revenue each	<input checked="" type="checkbox"/> Behind	<input type="checkbox"/> On Track	<input type="checkbox"/> Ahead
Building a plan with leadership to become a VP and executing on that plan	<input type="checkbox"/> Behind	<input checked="" type="checkbox"/> On Track	<input type="checkbox"/> Ahead

Goal Setting Worksheet Example

Action Plan

Accountability Partner Name: Jim Appleton

Report Progress on (day and time): Fridays at 1 p.m.

Priorities This Quarter	Objectives This Month
<i>No more than 5. As few as possible. Bold the most important priority.</i>	<i>As few as possible. Bold the most important objective.</i>
<ul style="list-style-type: none"> Prospecting: Double my efforts for net new logos Account growth: build and execute plans to grow 5 of my 15 most important accounts Drive 5 new proposals for greater than 6 figures 	<ul style="list-style-type: none"> Spend 25% of time prospecting Build and approve 2 account plans Focus on my top 15 deals in the pipeline to drive 6 figure proposals Avoid small sales to increase time for big ones
Success Metrics:	Success Metrics:
<ul style="list-style-type: none"> Pipeline growth from \$4.5m to \$5.5m 5 new six figure opportunities in the pipeline 5 completed and approved account plans My SVP approving my career advancement plan 	<ul style="list-style-type: none"> 15 proactively set new meetings 2 account plans approved

To Do This Week
<i>Plan actions and calendar investment activities for next week on (day and time).</i>
<ul style="list-style-type: none"> Calendar 15 hours of prospecting and don't get distracted Hold account plan meeting #1 and begin building accounts Write and present the ACME proposal Prepare strongly for my 3 most important sales meetings Build an opportunity plan to win the Smith deal and give the competition no chance

To Do - Core List	
GIA Today:	Prospecting: 4 hours calendared! No distractions.
<ul style="list-style-type: none"> Do morning routine every day 	
<To do list of all items goes here. Look at your to do this week and prioritize them in order.>	

Goal Setting Worksheet Example

Habits to Change or Develop

Habits I Want to Change or Develop (focus on work habit)	How I Plan to Change or Develop This Habit	Why Am I Doing This?
I don't work out.	Calendar it. Do a commitment contract. Positive self talk "I can work out!"	Lose 15 lbs. Feel better. More energy.
Need to work on the increasing my professional development time every month.	Work with Steve. Set priorities one by one and execute them.	Need to do this to drive account growth and get promoted to VP
I get distracted when doing work I don't love.	I need to power through work I don't love when I need to do it: sprint and relay	Need to stop a) wasting time, and b) missing my quarterly priorities
Be a better relationship developer.	Stop being cranky. Fix my attitude before meetings. Say, "I'm likeable." Focus on rapport time. Make lunch appointments.	Can't grow accounts unless I do this. Can't get promoted to VP unless I show success here.
Stop wasting time in the a.m. on reading web articles.	Say "When I open a browser, close it and look at my priority list."	Save 5 hours a week.

TIME

Treasured TIME I Want
<ul style="list-style-type: none"> ▪ Time with family ▪ Golf regularly ▪ Travel with my spouse one-on-one ▪ Travel with family – new adventures ▪ Charity work and events ▪ Time with friends, deeper relationships

Investment TIME for My Focus (in order of importance)	
Topic	Why
Prospecting	Drives pipeline, necessary for sales growth
Account development	Best and smartest opportunity to beat quota
Winning major sales	Can increase win rate from 35% to 55%
Professional development	Keep focus on growth and promotion
Mindfulness	Gives focus, clarity, calm, energy
Exercise	Feel better, more energy, healthier, happier

Goal Setting Worksheet Example

Mandatory TIME		
Topic	Minimize or Outsource Strategy	Hours Saved Target (per week)
Commuting	<ul style="list-style-type: none"> ▪ Work from home on concentrate days ▪ Listen to business books when driving 	2
House work	Outsource laundry, cleaning, filing, yardwork	2
Errands	Give to Jim, others	4

Empty TIME		
Topic	Minimize Strategy	Hours Saved Target
Stop using Facebook so much	Log in only once a week	4
Watch only 1 TV show a night	<ul style="list-style-type: none"> ▪ Plan in advance what to watch ▪ Say 3...2...1 Stop! if I'm channel surfing 	6
Stop mindless web browsing	Only open browsers at night, not during the work day	5

Avoiding Distraction

Be Impossible to Distract (Focus on work environment)	
Distraction	How I Will Avoid
Alerts	Turn of all alerts
People coming to door and interrupting	Close door, signal do not disturb
Phone rings	Turn on DND so it doesn't ring
Phone and email checking habit	Sprint - don't look at phone/tech when sprinting
General interruptions	Periodically turn on OOO on concentrate days
Intermittent meetings kill concentration time	Bulk schedule meetings and calendar concentrate time; get Jim's help here

Goal Setting Worksheet Example

My "To Don't" List

Possible priorities or actions that are good, but not great right now, or great but not priorities right now. Focus on work.

- Focusing on deals under \$25k unless they are at strategic accounts
- Focusing on accounts that can't be at least \$250k
- Joining meetings when asked unless I'm really needed or it helps me meet my goals
- Web surfing during the work day

Maximizing Energy

How I'll manage energy across the following.

Mind:	Body:	Spirit:
<ul style="list-style-type: none"> ▪ Practice mindfulness ▪ Get consistently good sleep 	<ul style="list-style-type: none"> ▪ Exercise 3x per week ▪ Walk around a lot during breaks ▪ Keep eating healthy 	<ul style="list-style-type: none"> ▪ Practice mindfulness ▪ Take Treasured Time on list

Track Your TIME

Activity	Category (T, I, M, or E)	Minutes
Commute	I	35
Email	M	10
Sales meeting	M	25
Quarterly pipeline metrics	I	45
Football scores	E	15
Lunch with Doug	T	60

Helpful Hints

- [Download your blank copy of the Goal Setting Worksheet here.](#)
- Start your daily to-do list with a GIA and do it first. No matter what.
- Print three copies of the time tracker (page 3 of the Goal Setting Worksheet) and complete it for at least three days to get a realistic picture of how you spend your TIME.

Extreme Productivity Challenge

Help Your Team Achieve Exceptional Increases in Productivity and Results

Sellers today are more distracted than ever. The never-ending dings, rings, and buzzes that interrupt workflow every few minutes are killing focus and productivity.

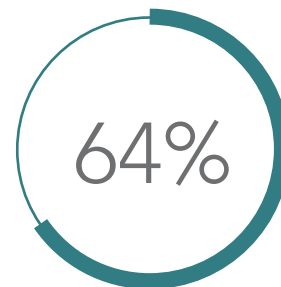
And they're killing your sales results.

You need a highly-motivated and focused sales team that brings their A-game day in and day out. In a unique, transformational, 90-day experience, the Extreme Productivity Challenge (XPC) teaches your sellers and sales managers how to get more done in the time they have, helping them to achieve exceptional increases in productivity and results.

In the Extreme Productivity Challenge, participants learn how to:

- Maximize motivation, make consistent progress, and achieve goals
- Control TIME with the simplest, most effective time management system
- Ignore distractions, focus, and get in the Extreme Productivity Zone
- Master The XP3 and 9 Habits of Extreme Productivity
- Implement an accountability system to maximize execution
- Achieve maximum output per work hour by focusing on the activities that get outsized returns

Your team will be introduced to the 90-Day XPC Plan, Roadmap to Habit Change, and TIME Analysis and Tracking Template, three proprietary tools that will help your sellers internalize their new knowledge and maximize their efficiency and productivity.



of companies do not believe their sellers manage their time, focus, and personal effectiveness well.

Program Approach

- Extreme Productivity Assessment
- 1-Day Intensive Workshop
- 90-Day Extreme Productivity Coaching
- Ongoing reinforcement

Contact Us to Transform Your Team

If your team needs to learn to:

- Develop quarterly, monthly, and weekly productivity plans
- Change habits
- Recover lost TIME and regain focus

Contact RAIN Group today at 508-405-0438 or info@raingroup.com.

About RAIN Group

Unleash the Sales Potential of Your Team with RAIN Group

RAIN Group is a sales training, assessment, and performance improvement company that helps leading organizations improve sales results. We've helped hundreds of thousands of salespeople, managers, and professionals in more than 73 countries increase their sales significantly with RAIN Group's consulting and sales methodology.

Implement Sales Training that Delivers Real Results

RAIN Group's sales training system inspires real change and delivers results that last. Our rigorous approach includes sales team evaluation, customized training programs, robust reinforcement, and coaching to help you and your team develop sales and negotiation skills, and maximize your results.

Grow Your Key Accounts

At most companies, there's a huge, untapped opportunity to add more value—and thus sell more—to existing accounts. We help our clients capitalize on these revenue growth opportunities. Whether it's simply increasing cross-selling and up-selling or implementing a major strategic account management program, we can help.

Identify Who Can and Will Sell with Great Success

Our assessments measure sales attributes and skills, identifying the factors that really make a difference in sales performance. Whether you're looking to hire someone who can and will sell, or looking to improve sales performance, we'll help you build the most successful sales team.

Implement World-Class Sales Coaching

We coach sellers, professionals, and leaders individually and in groups to achieve the greatest increase in sales results. And we train and certify leaders and managers in our RAIN Sales Coaching system. Often, it's RAIN Sales Coaching that truly unlocks the team's potential, and keeps them motivated to produce the best results consistently.

Find out more about how RAIN Group can help you unleash the sales potential of your team by visiting raingroup.com or calling (508) 405-0438.

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