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# Project YOU Part I Goal Setting Guide

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Created by Lyndsay Swinton for [Management For The Rest Of Us](#)

In conjunction with Project YOU Part II - [Personal Development Plan Guide](#)

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## Setting goals well helps you...

get out of that rut  
take control...

...focus on the  
important things

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## About the author Lyndsay Swinton



Lyndsay Swinton is an experienced **people manager** and **team leader**. She has earned her spurs in a variety of management environments, from factory floor to tech teams.

Having graduated with a **first class honours** engineering degree from **Strathclyde University** in Glasgow, Scotland, Lyndsay completed the **Guinness Graduate Training Scheme**, designed to get green graduates up to speed fast. Several years, and two blue chip companies later, Lyndsay has gained wide practical experience of people management and motivation.

Grass roots experience was earned managing **The Body Shop** production floor, study was done at top colleges including **Ashridge** and **Uncommon Knowledge**, and most recently experience gained working in a complex matrix environment, crossing international boundaries in **American Express**.

Lyndsay has **received formal recognition for her leadership abilities**, ranked highly against her peers at annual appraisals and most importantly regularly receives **glowing feedback from her team** about her human approach to management. Much of her learning comes from having made her **fair share of mistakes** and being on the receiving end of some very poor management.

She loves to help others **fulfill their potential**, and gains no greater satisfaction than seeing a team member surprise themselves with their abilities.

## Background

This guide explains **Project YOU Part I – the Goal Setting process**. It is modelled on **successful** goal setting processes used in large organizations or companies and has been evolved to suit a wider audience. This guide will give you structure around setting your own goals, and can be used in conjunction with the **Project YOU Part II – the Personal Development Planning process**.

## How to use this guide

1. Set aside half an hour to dedicate to **yourself** and your future **achievement** and **happiness**. 😊 Get yourself a cup of your



**favourite** beverage ...

... to reward yourself for making such an **intelligent** decision!

2. Read through the whole process so you can get an **overview**.
3. Follow the **goal setting example** you are given so you can see the process in **action**.
4. Follow the instructions on how to set **your own** important goals.
5. Sit back and feel a glow of **satisfaction** at having made the first step in a journey of personal **fulfilment** and **achievement**!

## Introduction - Why set personal goals?

*"If you aim at nothing, you'll hit it every time"*

Most of us have come across goals in the **workplace**, as goals form the core of your workload and provide a **focus** for your efforts. Goal achievement is often linked to the appraisal process and can affect your salary or your promotional opportunities.

But what are the **benefits** of goal setting **outside** the corporate arena? There are loads...

### **Benefits of personal goal setting**

- ❑ **You get out of that rut**
- ❑ **You take control of your life**
- ❑ **Your actions match your talk**
- ❑ **You focus on the important things**
- ❑ **You are successful, regardless of what that means to other people**
- ❑ **Other people understand where you are coming from**

This guide will take you through the practical steps required to **create** and **attain** top quality goals, and how to avoid the common **pitfalls**. It also links with the [Personal Development Plan Guide](#), so consider taking time to

do that after you have completed the goal setting guide. **Real** examples are given to help explain the goal setting theory.

### **How goal setting changed my world**

Many years ago, as a new graduate embarking on a career in a major blue chip company, a friend's wise mother lent me a tape on how to set goals. Looking back, maybe it wasn't that sophisticated, however it really **opened my eyes** to a new way of thinking and living my life.

I had been successful at school and university but was pretty **daunted** by the prospect of life in the real world and achieving success there. **Goal setting changed my world**. I invested a few hours in figuring out what I wanted to achieve, wrote it down, and then did it. And it really worked, (and still works!). I support people taking **control** of their own destiny and goal setting is a **proven** means of doing that.

## **A little background on how goals work**

Goals are cascaded throughout an organization, where an individual's goals are a **sub-set** of their boss's goals and so on up the hierarchy. So achieving my goals helps my boss achieve her goals, helps her boss... and so on.

**Goal results** are set to meet **business needs** covering areas like meeting shareholder performance targets, customer servicing levels and employee satisfaction. A company with a **performance related pay** system uses an individual's goal achievement results to allocate pay increases; if you exceed your goals you receive more money. This is one incentive for an employee to work hard for the company. For this and other reasons, goal setting in

the workplace can be an **emotive** issue and requires careful management to ensure **equity**.

Conversely, lack of **meaningful** goals can mean disaster for a business. Individuals can end up doing their own thing, working at cross-purposes, or **overlapping** effort. Both good and poor performance goes **un-noticed**, as no one really knows what that is. Sensible companies invest a lot of time and effort in the goal setting process, as they want to succeed.

## Goals and your personal values

You will get the best results if your **goals** are **in line** with your personal **values**. But what are your personal values? Articulating what you are about is a good starting point for understanding your **motivations** in life and you can do this by writing your own "mission statement."

"Things which matter **most**  
must never be at the mercy of  
things which matter **least**"

Goethe

## **Your own mission statement**

Most companies have a mission statement encapsulating what the company stands for, translating **aspirations** into employee **actions**. However they are often made meaningless in the quest to make them politically correct or contain the latest management jargon or look great printed on giant posters.

### **Don't let this put you off!**

The **meaning of life** is a million dollar question. Let's make it easier to answer by narrowing it down, and figure out the meaning of **your** life. What will your epitaph be?

Start by writing down a few words or sentences that best describe your aspirations, meaning or guiding principles.

You could think of these in terms of the different **roles** you have (wife, grand-father, manager, coach, son etc) to get a **rounded**, holistic view of your life. You might want to keep this **private** as the act of explaining it to someone else may make it lose its meaning. On the other hand, sharing your personal mission statement may provide additional **insight**. The choice is yours!

Here are a few examples to help you get started on this task;

- *I am a healthy person who has the wisdom to know what I can and cannot control in my life, and act accordingly.*
- *I work to live and provide for my family. This means financially, emotionally and spiritually.*
- *I am respected in my professional life as being knowledgeable, accessible and eager to learn.*

If you are still struggling for inspiration, a great resource is the popular “The 7 Habits of Highly Effective People” by Stephen R Covey, which covers this in detail.

Stick with this phase through all the soul searching and ambiguity, as in the words of the Cheshire Cat in Alice in Wonderland, "*If you don't know where you're going, it doesn't matter which way you go.*" Indeed!

## Writing your goals

Okay, that’s enough of the “deep and meaningful stuff”. A little bit of introspection and navel gazing can do you good as long as you translate that new **understanding** into **action**. So let’s get down to the nitty gritty task of writing your goals.

**Top Tip** – from my experience as a manager, people become impressively creative in the art of **work avoidance** when they are asked to do their goals!

Like clearing out the attic or weeding the garden, the more **chaos** and mess there is, the **less** you want to do it! The only instruction I can give is to **stop procrastinating** and just do it! You’ll be glad you did! People’s main concern is often that the goals they had written were not “**right**”. There is no such thing as a “right” goal, only what has **meaning** for you.

A goal that is written **70%** well is better than **no** goal at all. Give yourself permission to give it a try, and worry about fine-tuning your goals later.

there is **no** such thing

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has **meaning** for you

### **Smartness in goals**

The world and his wife generally expect that goals should be **SMART**. This is stands for Specific, Measurable, Achievable, Relevant and Time-bound, and is a useful reminder of how to write a top quality goal. Here's what it means...

**Specific** – your goal should have its expected **outcome** stated as **simply**, **concisely** and **explicitly** as possible. This answers questions such as; how much, for whom, for what?

**Measurable** – a **measurable** goal has an **outcome** that can be **assessed** either on a **sliding** scale (1-10), or as a hit or miss, success or failure.

**Achievable** – an **achievable** goal has an **outcome** that is **realistic** given your current situation, resources and time available. Goal achievement may be more of a “**stretch**” if the outcome is tough or you have a weak starting position.

**Relevant** – a **relevant** goal should **help you** on your **mission** or your “bigger” objectives.

**Time-bound** – a time-bound goal includes **realistic** timeframes.

**S p e c i f i c**

**M e a s u r a b l e**

**A c h i e v a b l e**

**R e l e v a n t**

**T i m e - b o u n d**

**Top Tip** – You should **limit** your goals to between 5 and 7 at any one time. To achieve your goals you have to **focus** your efforts and attention. As you progress and complete goals, you may add **new** goals. If you find yourself with more than 7 goals, you are probably writing mini-goals or

**tasks.** Remember to keep your goals focussed on a **major** area of responsibility.

A sample completed [goal sheet](#) is included to show you how to lay out your goals. As you read through the following explanations, refer to the [completed example](#) so that you can see how the theory has been put into practice. Print off the page or use a bookmark to keep the example to hand.

## 1 - Goal statement

Create a brief summary statement of the goal, and include details such as timing, cost, location etc to make it real.

## 2 - Measure of success and goal assessment

A measure of success is **how you will know your goal has been achieved**, and to what degree. You need to make some specific, measurable statements about what the possible outcomes will be, but how do you do that? You have two main choices; "discrete" or "continuous".

### Discrete

You could use a "discrete" measurement of goal achievement, that is, you either hit or miss a goal. This is a **simple** way of measuring success. Use with **caution** though, as missing a goal by a whisker and calling that 'failure' can be discouraging.

all or nothing

## Continuous

Or you could measure success using “continuous” results or a sliding scale. This method is **common** in most large organisations or companies. A rating system determines how effective an employee has been in meeting their goals, e.g. a range of 1-4 where 1 is unsatisfactory and 4 is distinguished performance.

The continuous measurement system takes more effort and subtlety of thought, however it encourages **optimistic thinking**. Perception of “shades of grey” encourages optimistic, non-depressive thinking and diffuses any emotional response to a goal outcome due to the multiple possibilities.

# shades of grey

This is best explained by an example. Your goal is to better manage your monthly budget, and start saving money. What you would “measure” is your monthly bank balance and your possible outcomes could be;

- ❑ **overdrawn by 10% or more - unsatisfactory**
- ❑ **not overdrawn – could do better in some areas**
- ❑ **saved at least 5% - expected outcome**
- ❑ **saved at least 10% - distinguished performance**

You have **articulated** what would rank as unsatisfactory through to what is above expectations. Giving yourself a **range** of results helps you succeed by

keeping you **motivated**. Also, the top rating may be an aggressive stretch target that will push you to achieve, and provide a challenge.

### 3 - Tasks

Now list the **major tasks** needed to achieve the goal. Keep this fairly high level to avoid getting bogged down in detail.

**Top Tip** - If you are struggling with this, consider working **backwards** from goal achievement through to your first step. This exercise is sometimes called "chunking", as you are breaking down a task into manageable sub-tasks.

The secret of working backwards is to keep it creative and **fun**; done well it really takes the **stress** out of goal setting. You start by 'living in the future' - telling the story of how your life is now you have achieved your goal and describing how you got there. This description will contain your tasks.

It can be useful to have a friend ask you questions as this will fill any gaps in your plan and they may spot flaws e.g. the funding for your goal came from winning the lottery!

h o w   d o   y o u   e a t  
a n   e l e p h a n t   ?

(Answer: One spoonful at a time 😊 )

## 4 - Timing

Putting real dates as **deadlines** for completing activities increases your success rate. Get out your diary or calendar and have a look at your existing time commitments. Be realistic.

A friend loved to go to the theatre but always forgot to book tickets in advance. As a result, they missed special offers, got the worst seats or missed the show, all of which they complained about. A desire to be 'spontaneous' led to a lack of organisational skills that was causing them to fail at their goal of seeing shows.

### Getting organised

If you suspect you may have similar tendencies, don't panic, help is at hand. Some people are naturally organised – to spot them, check out their CD collection. If it's neatly lined up in alphabetical order, then you may want to get some tips from them!

These lucky people will find "doing" their goals much easier as they are skilled in organising themselves. For the rest of you, organising your time is a learnable skill (there are hundreds of Time Management gurus after all) so **work hard** at it, **keep focussed** and **avoid distractions** in order to increase your goal achievement success.

# organising your time is a learned skill

**Top Tip** – Do some research on the widely used **Myers-Briggs** personal preference profile. Take a free online profile, or there are many fee paying sites that offer a personalised summary.

In this context, the important Myers-Briggs dimension is your personal preference for organising yourself and information. At one extreme is the “**Judgement**” (J) personality where events and activities are planned and executed with military precision, and at the other is the “**Perceiving**” (P) personality that cruises along seeking distractions and pulls all-night sessions to complete goals on time. Most Myers-Brigg’s sites or books include tips and activities to improve the non preferred profile – so all you “P’s” will find tips to improve your “J” skills.

As with all such models, Myers-Briggs is only that – a model, but it can be helpful in identifying your areas of potential development!

## 5 - Self Assessment

When considering a goal, it is a good idea to examine both your **ability** and **enthusiasm** for it.

Tasks that require you to learn a **new skill** require a different approach than a task you **know** how to do. There is no need to worry because any gaps in ability or enthusiasm can be closed by appropriate activities. This self-assessment has a direct link to personal development planning (see the Project You [Personal Development Plan guide](#)), and with goal achievement itself.

Go through each task in turn and ask yourself the following questions. If any of the elements is missing or low, then you can say you have low 'skill' or 'will' in that area. If this is the case, then consider how you can close that gap, and plan it in as a task.

### Ability (skill)

- have I been taught to do this?
- do I see this as my role?
- do I know how to do this?
- have I successfully done this, or something similar, before?

### Enthusiasm (will)

- do I want to do this? Is it in line with my personal values?
- what's in it for me?
- what is the risk of failure? Am I okay with taking that level of risk?
- do I think I can do it?

**Top Tip** - If you would like to research this model further, suggested reading includes “The One Minute Manager” by Kenneth Blanchard and Spencer Johnson and other books on Situational Leadership.

This is a practical, objective approach and an honest self-assessment will maximise to your goal achievement. A tradesman has to purchase or hire **special tools** to do some jobs, so why shouldn't you? Admitting you don't know how to do something or that you are scared of doing it is not an admission of weakness. It just means you haven't got the tools... yet.

A useful resource in this area is the [free self confidence course](#) from Uncommon Knowledge.

an **honest** self-assessment

will contribute **greatly**

to your goal

**achievement**

## 6 – Results

As you progress, note your **key results** and **update** your goal sheet on a regular basis. A quick review of the tasks, timing and self-assessment will enable you to make any necessary changes. Allowing yourself the flexibility to change, whilst keeping true to the main objective will boost your success rate more than sticking doggedly to your original plan.

Now take a look at the following [Example Goal Sheet](#) to give yourself a template for setting your own goals...

## Example Goal Worksheet

Use this fictional example goal sheet to help you see how the theory is put into practice.

<p><b>Goal Statement</b></p> <p>My goal is to run the London marathon in April 2005, and to finish in a reasonable position and with a good race time.</p>		
<p><b>Measures of Success</b></p> <p>Unsatisfactory - finish in the top 400, get within 30 minutes of personal best.          Could do better - finish in the top 400, get within 15 minutes of personal best.          Expected - finish in top 300 and match personal best time.          Distinguished - finish in the top 200 and beat personal best race time by 10 minutes.</p>		
<p><b>Tasks</b></p> <p>Write up Training Schedule and review with local athletics club.</p> <p>Follow Training Schedule</p> <p>Get diet advice and re-stock kitchen cupboards with appropriate food.</p> <p>Run local half-marathon</p> <p>Enrol in London Marathon</p> <p>Run the London marathon!</p>	<p><b>Timing</b></p> <p>By Aug</p> <p>By Sep &amp; ongoing</p> <p>By Oct</p> <p>Nov 14<sup>th</sup></p> <p>By Nov</p> <p>23 Apr 05</p>	<p><b>Self Assessment</b></p> <p>Low skill, high will</p> <p>High skill, low will</p> <p>Low skill, low will</p> <p>High skill, high will</p> <p>High skill, high will</p>

## **Results**

*August* - Researched training plans on the internet and local library and met with local athletics club. They helped me improve my Training Schedule.

*September* – from the [self confidence course](#) I did (as part of my development plan), I identified that I am most confident when I have a running buddy, so will take my dog out with me for now and look for a running buddy at the local athletics club.

*October* – Had a hectic month at work so haven't sorted out kitchen cupboards and diet, so will need to do this next month. Training Schedule on track.

*November* – ran half marathon and achieved good race time. Bought reflective running gear as a reward and so I can run more safely at night and stick with the Training Schedule.

*December* – stopped taking dog running, as he now can't keep up with me. Need to find a running companion next month! Finally managed to sort out my diet and cupboards. Found out that I was already following a pretty good diet!

*January* – Got flu for 2 weeks so training schedule has been reduced for 3 weeks. No need for a running companion, as I haven't been able to train.

*February* – couldn't find a regular running buddy, so my partner started cycling with me as I ran to help keep a good pace.

*March* –really focussed on diet and mental preparation. Practised mental games to play to keep me focussed when running.

*April* – ran the race and came 235<sup>th</sup>, and took 16 minutes off my personal best. Although this outcome is between the 3 and 4 ratings, I think I did a great job!

## Background Thinking and Processes Used to Create the Goal Sheet

Now let's look at how the goal example was put together.

### 1 – General review

Go through each of the SMART characteristics and see if they fit with the example plan.

- Is it **Specific**? – Yes, the goal relates to a specific race.
- Is it **Measurable**? – Yes, and have selected the measurement system and a range of outcomes
- Is it **Achievable**? – Yes, I have run marathons before and have a reasonable personal best time, and am confident I can achieve it again.
- Is it **Relevant**? – Yes, it motivates me to go out and train regularly, keeping me fit and providing relaxation.
- Is it **Time-bound**? – Yes, the actual race date is included and each task has been scheduled to fit into the run-up to the date.

### 2 - Self assessment of tasks and link to personal development plan

I have assessed each task to establish if I am high or low skill or will, and will use this information to create a supporting [personal development plan](#) to

close any gaps in ability (skill) or enthusiasm (will). Let's look at each task and self assessment in turn.

*Write up training schedule.* I previously made up my own training plans and recognise I am not an expert in this field, therefore I have low skill. I am hugely motivated to get this plan right, therefore I have high will. To address the skills gap, I will get help from a local athletics team to plan my training.

*Follow training schedule.* I have followed training plans before and understand their importance, therefore I am high skill. I am nervous about running on my own, especially in the winter, so I am low will. Need to do something that will increase my confidence.

*Get diet advice and re-stock kitchen cupboards with appropriate food.* I have never thought about my diet and running before and don't know where to start, therefore am low skill. I love all kinds of food and suspect I may have to stop eating some of my favourites, therefore am low will.

*Run half marathon.* I have run this race before, therefore high skill. I know it's a great course and my race time will be a good indication of how well my training is going, so am high will. No worries!

*Enrol in the London marathon.* I have done this before and know I am good at organising myself so am high skill and will. I have included the task as a reminder, as not enrolling would mean I couldn't run and the whole goal would be affected. In business terms this would be called a "milestone".

*Run the London marathon.* I have not assessed this task, as it is the main goal.

I have thought about the actions I need to take to close gaps in ability (skill) or motivation (will) and have summarised them using the [Personal Development Plan](#) structure.

Focus Area	Now	Will Be?	How known?	Activity	Resource	Timing	Reward
Creating Training Plan	Could be better	Training regularly Injury free	Will achieve marathon goal	Research on the internet and local library	Local athletics club	By Aug	
Following Training Plan	Nervous running at night Don't stick to training plan.	Running in any condition or time. Feel good am following plan.	Stick to training schedule in winter Will achieve race time goals	Self confidence email course	<a href="http://www.self-confidence.co.uk/">http://www.self-confidence.co.uk/</a>	By Sep	New running kit.
Diet	Not sure if diet is good. Eat a lot of chocolate.	Confident am following a good diet	At target weight Have energy to train Speak knowledgeably about diet.	See dietician and get expert advice Restock cupboards	Local health clinic My partner	By Oct	

## Assessing personal development requirements by reviewing results

In the goal worksheet, the results for each month have been included. You will note that some of the mini goals have not been met e.g. the diet work was 2 months later than planned and that I didn't follow the plan in January due to sickness. As you see in the end, this has not affected the main goal result. You don't have to win **every battle** to win the **war**!

Lets look at why there was **procrastination** with the diet work. I self-assessed as being low skill and low will. Now I *could* work on motivating myself and giving some great self-talk on why I should stick to a good diet. But if I lack the basic information to know what that diet is, I am unlikely to make progress. So, by focussing on closing my knowledge gap, I will make the most difference and find the motivation follows. Some people are uncomfortable asking for advice as they feel it exposes weakness.

Things happen as we go along and even the best laid plans can go awry. So what should you do when something does not go to plan? The healthy response is to take action to correct it, and if you can't, let yourself be okay about it and move on.

even the **best** laid plans

can go **awry**

Let's look at the sickness in January. The tendency may be to throw up your arms and say it's all over and **quit**, as the training schedule will be so badly impacted how can I **possibly** get in enough running?

An alternative, and more useful response would be to say, **okay** I'm sick, take the appropriate medication and use the rest time to **amend** the training schedule and work on my **mental** preparation instead. Perhaps I can spend more time with my partner **motivating** them to join me in training runs and helping get my pace back.

**Optimism** in the face of **adversity** is a learned skill and often just by changing how you **think** about an event can change the whole meaning. **Reviewing** your progress regularly and being **honest** with yourself will all help towards increasing your goal achievement success rate.

# Optimism

in the face of **adversity**  
is a **learned** skill

**Now it's your turn.....**

Okay, you've read the theory, gone through an example, now it's your turn. Here's a summary of the steps;

- 1. What are your personal values? What is your mission statement?**
- 2. What do you want to achieve? What are your goals?**
- 3. Write your goals. Make them SMART and use the goal sheets to make sure they are top quality goals.**
- 4. Write your personal development plan. Use the [Personal Development Planning Guide](#)**
- 5. Review your progress and update your goals accordingly.**
- 6. Celebrate your success!**
- 7. Start the process all over again. Consider making goal setting (at least) an annual event.**

You now have the information and knowledge that could help **transform** your life. Get out of that rut, take control and just do it!

**Warm Regards**

**Lyndsay Swinton**

Lyndsay can be contacted online at [UncommonForum.com](http://UncommonForum.com) where she is a moderator.

## **Personal Coaching**

If you are interested in having Lyndsay help you with your goal setting and personal development, you can contact her at:

[lyndsay.swinton@mftrou.com](mailto:lyndsay.swinton@mftrou.com)

Get out of that **rut.**

Take **control.**

**Go ahead...**

**... and do it NOW!**