

LeaderShift

architect

Goal Setting

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For many years, people operated under the misconception that they have two separate lives divided by work life and home life that should remain entirely separate. Many prioritized their careers at the expense of their families and personal well-being, chasing the idea of success while other aspects of their lives suffered as a result.

As the 20th century ended, a shift began. Younger generations started challenging traditional values, rejecting the rigid work ethic of the "establishment" and emphasizing the importance of recognizing individuals as more than their jobs. While their message highlighted an essential truth—that people's identities and needs extend beyond work—they swung the pendulum too far in the opposite direction.

In recent years, the concept of work-life balance has evolved. It is now clear that achieving a perfect 50/50 balance between work and personal life is neither realistic nor desirable. True balance is fluid, requiring flexibility and integration. While setting boundaries and goals is important, we must also recognize that life is holistic. Our various roles and aspirations overlap, drawing strength and momentum from one another.

Rather than striving for an unattainable equilibrium, we must prioritize and adapt, carefully strategizing and executing actions to meet the demands of each role. Balance is less about perfect division and more about mindful alignment across each of our roles and life goals.

Balance & Symmetry

While balance is an important concept, symmetry offers a deeper perspective. It reflects the correct proportion between parts or the harmony among different elements. Achieving balance in life doesn't mean striving for an even 50/50 split. Instead, it requires us to consciously adjust our time, energy, and focus on what matters most without neglecting other important areas. When one part of our lives is neglected or "out of whack," it often disrupts everything else, leaving us far from optimal. To thrive, we must recognize that fulfilling a variety of needs is essential to being well-adjusted and happy. These basic needs can be grouped into seven categories:

Mental: Encompasses functions of the mind, including memory, learning, creativity, reasoning, and problem-solving skills.

Physical: Relates to body health, fitness, agility, endurance, and overall physical performance.

Family: Centers on relationships with those we consider part of our family.

Social: Focuses on connections with others outside of family and work.

Spiritual: Reflects our relationship with the universe, creator, or personal beliefs, including humanitarian and philosophical values.

Career: Involves professional development and contributions in your chosen field.

Financial: Relates to managing financial resources and obligations effectively.

In many ways, our lives mirror a fragile ecosystem. Each element is interconnected, with one area influencing others—especially when neglected. For instance, financial difficulties can negatively impact health, personal outlook, social relationships, and family dynamics. This interdependence is why holistic approaches often consider all facets of a person's life to address challenges effectively.

To start and maintain your career on the right foot, along with fulfilling each of your other roles, aim to bring balance to your life by setting goals. Begin by identifying the outcomes you want in each area of life. From there, create actionable steps and intermediate goals to bridge the gap between where you are now and the vision of your ideal self.

A perfect 50/50 balance isn't just unlikely—it's unrealistic and impractical. Life requires constant prioritization, and success depends on staying intentional, thoughtfully strategizing, and diligently taking action to meet the demands of each role and goal we pursue.

The Importance of Goals

*“Most people aim at nothing in life. . .
and hit it with amazing accuracy.”
(Anonymous)*

This statement highlights a harsh truth: a life without goals lacks direction and purpose. It is the pursuit and attainment of goals that give meaning to our lives. This idea is beautifully illustrated in Alice in Wonderland:

Alice: Mr. Cat, which of these paths shall I take?

Cheshire Cat: Where do you want to go?

Alice: I don't suppose it really matters.

Cheshire Cat: Then any path will do!

Whether traveling through life or navigating your career, if you don't know your destination, you'll never know if you've arrived. Taking “any” road will leave your fulfillment to chance and that is not good enough!

Goals are the antidote to aimlessness. Without them, people often feel unbalanced, leading to anxiety and dissatisfaction. In contrast, those who set and pursue goals exude confidence, earn respect, and find purpose. Making deliberate decisions to shape your future is a sign of strength and determination.

History provides countless examples of the importance of goals. Imagine this hypothetical exchange after Sir Edmund Hillary's ascent of Mount Everest:

Reporter: Congratulations, Sir Hillary! Tell me, why did you become the first man to conquer Mount Everest?

Sir Hillary: I was just wandering around trying to become inspired when I ended up on the top of this mountain.

Reporter: Really! Did it work?

Sir Hillary: Yes, but by the time I got back I forgot what I was trying to achieve!

Of course, this scenario is absurd because such a monumental feat such as climbing Mount Everest would take some serious goal setting and planning. Naturally, Sir Hillary had to work hard to gain the knowledge and physical skill necessary for the climb. He also had to acquire the help of a team of experts and procure all the equipment. The planning stages must have taken an enormous amount of time - longer, no doubt, than the climb itself.

The same principles apply whether applying to your career, personal wellness, finances or relationships. Goals are the antidote to aimlessness. Without them, people often feel unbalanced, leading to anxiety and dissatisfaction. In contrast, those who set and pursue goals exude confidence, earn respect, and find purpose. Making deliberate decisions to shape your future is a sign of strength and determination. Goals, when earnestly pursued, give people reasons to do some things and to avoid other things.

Consider a woman who aspired to run a marathon despite never having been a long-distance runner. Her goal motivated her to adopt a structured training plan, improve her nutrition, and gradually build her endurance. Along the way, she turned down distractions and prioritized habits that aligned with her ambition. By the time she crossed the finish line, she had not only achieved her goal but also transformed her lifestyle and gained newfound confidence in her ability to tackle challenges. This demonstrates how clear goals provide purpose and inspire positive, life-changing decisions.

Goal-oriented individuals stand out. They radiate purpose, determination, and energy. They are willing to invest more time and effort into tasks, often becoming more optimistic and assertive in the process.

A helpful metaphor compares people to bodies of water. Someone without goals is like a stagnant lake, still and unchanging. In contrast, a goal-oriented person is like a flowing river, dynamic and unstoppable as it carves its path through obstacles. The river's movement symbolizes enthusiasm and progress.

Research on productivity consistently confirms that goal-setters achieve more than those who simply go through the motions of a job. Having clear goals fosters pride, ownership, and greater career satisfaction. In contrast, workers without direction often finish their day with little more than a paycheck and frustration. Even in factory settings, productivity improves when workers are given incentives or clear objectives, demonstrating the "WIIFM" principle: What's In It For Me? Greater rewards inspire greater effort toward achieving goals.

Nearly every expert on personal success agrees on one key point: committing your goals to paper significantly increases your likelihood of achieving them. Writing down your goals transforms vague intentions into concrete plans, stacking the odds in your favor.

The rewards of goal setting extend beyond any financial return. Clarifying your values and setting goals across all areas of life allows the right opportunities to unfold naturally. These "roads" are not mirages but real, guiding you toward a balanced, fulfilling life. With clear goals, decision-making becomes easier, and you take a giant step closer to living with purpose and intention.

Foundation Development

Unfortunately, our society is externally oriented. We judge books by their covers, people by their wealth or beauty, and jeans by their designers. Our culture teaches us superficial values by which to live and judge others. These values are not conducive to the development of the qualities of inner strength, sensitivity, patience, thoughtfulness, compassion, or other virtues necessary for well adjusted, happy individuals. Yet to strive long and hard toward an important goal one should possess a firm foundation of these inner qualities. This is true for any endeavor requiring inner fortitude.

The same principle applies to psychotherapy. Before a client can start on the path to being well adjusted (balanced), his or her basic values must be explored and clarified.

Building a successful career is like building a house. If your foundation of inner qualities is strong, you can continue to rise on each completed accomplishment. If your foundation is weak, however, it could all crumble in a storm, such as a personal slump or weak economy.

Assumptions and Their Effect on Behavior

When you stop operating under the assumption that things will go on forever as they are, you can then initiate some changes. More often than not, it is our assumptions that limit our perceived options. Negative assumptions set up internal obstacles that automatically defeat us.

One of the most common negative assumptions is, “I’ll never accomplish that, so why should I waste my time?” If you assume that you will not achieve a certain objective, then you will not! Either you will pass it by, or you will predetermine the outcome by your attitude.

Some common negative assumptions are;

- “I’ll never be a great parent/spouse/friend with my work schedule.”
- “I can’t build authentic relationships in my role; everything feels transactional.”
- “It’s too late to pivot my career at this stage in my life.”
- “I’m not smart or good enough to get that promotion or start my own business.”
- “I’ve been faking it til’ I make it and people will find out I’m a fraud.”
- “I’ll never have enough time to prioritize my physical fitness.”
- “I can’t show emotional vulnerability without risking my authority.”
- “I’ll never be financially independent beyond my current job.”
- “I don’t have the creativity to innovate or explore new ideas.”
- “I can’t find a mentor at this stage of my career.”
- “I’ll never have time to enjoy hobbies or creative outlets until I retire.”
- “I can’t make a meaningful impact beyond my business responsibilities.”
- “I can’t relinquish control without things falling apart.”
- “I’ll never find inner peace with the pressures I face daily.”

Such negative assumptions usually become a self-fulfilling prophecy. You assume you cannot do something and then you act in ways that guarantee your failure. You have then reinforced your original assumption. This could go on and on until you quit trying altogether.

The relationship between assumptions and behaviors can be understood as $A1 \rightarrow B1$, where "A" represents an assumption, "B" represents a behavior, and the arrow indicates "leads to." When you believe you are only capable of a specific behavior, your actions naturally align with and are limited by that belief. To achieve new behaviors and reach higher levels of success, it is essential to expand your assumptions about what you can accomplish.

Positive Thinking

In recent years there has been much criticism levied at positive thinking, probably because it has been exploited and over-commercialized. The fact remains, however, that positive thinking works. If you are serious about succeeding in your chosen field, it will be necessary for you to cultivate positive thinking as a habit.

Self-Confidence

Self-confidence is the foundation that nurtures personal growth and fuels achievement. It arises from an awareness of our inherent worth and the vast potential we possess—much of which remains untapped. We are full of possibilities, and the choice to unlock them lies entirely within our control.

Self-confidence is strongest when it is grounded in self-awareness and respect, rather than in comparison to others. Don't compare yourself to others, as it may lead to arrogance or resentment—neither of which serves you. True self-confidence thrives independently, drawing strength from the ongoing discovery of one's unique potential.

Model for Achievement

After you have discovered your potential and taken responsibility for it, you can begin to become aware. Awareness starts with evaluating your strengths and weaknesses in the light of your current situation. You then expand your assumptions to accept more goals that are possible for yourself. This leads you to expand your actions and eventually to achieve your goals. The model for this process is:

AWARENESS → BELIEFS → GOALS → PLANS → ACTIONS → ACHIEVEMENTS

One step leads sequentially to another. After an achievement, you reevaluate yourself and find that each new feather in your cap makes you feel capable of accomplishing more and more. Your beliefs (assumptions) then expand, making more goals possible. The effect gains momentum and grows like a snowball rolling downhill. In this way, greatness is achieved through small "stepping stones."

The Filter of One's Self-Concept

Ideally, all new ideas could start at the awareness stage and move on to the belief stage. However, something called a self-concept may get in the way. Our self-concept is the image we hold of ourselves. It is the evaluation we justly or unjustly make based on everything we have known about ourselves.

Most of us arrive at an inaccurate self-concept. We are negative thinkers by habit. This limited self-concept acts as a filter to limit the number of new things that we feel we are capable of doing. What happens is this: A new thought or feeling comes into our awareness. It comes up against the filter, which compares it to our self-concept. If the idea is consistent with our self-concept, then the new idea is accepted and becomes a belief. If the idea is not consistent with our self-concept, however, it is rejected. It is for this reason that the development of a healthy self-concept is one of the most valuable things you can do for yourself.

Self-Exploration

In order to explore yourself and have a better idea of your values, I have designed a personal inventory for you to complete. It consists of seven pages, one for each facet of your life--mental, physical, family, social, spiritual, career, and financial. In each of these seven categories, we would like you to write down short phrases about how you see yourself in terms of strengths and weaknesses in each of the seven areas, plus your current situation and things you would like to change in each of the seven areas.

SELF-EXPLORATION: MENTAL

My strengths: _____

My accomplishments: _____

My current situation: (Am I adapting/growing or standing still?) _____

Things I would like to change: _____



SELF-EXPLORATION: PHYSICAL

My strengths: _____

My accomplishments: _____

My current situation: (What kind of shape am I in?) _____

Things I would like to change: _____

SELF-EXPLORATION: FAMILY

My strengths: _____

My accomplishments: _____

My current situation: (Discordant? Harmonious?) _____

Things I would like to change: _____

SELF-EXPLORATION: SOCIAL

My strengths: _____

My accomplishments: _____

My current situation: (Are my needs being met? Am I meeting the needs of my friends?) _____

Things I would like to change: _____

SELF-EXPLORATION: SPIRITUAL

My strengths: _____

My accomplishments: _____

My current situation: (Is my spiritual consciousness growing/deepening?) _____

Things I would like to change: _____



SELF-EXPLORATION: CAREER

My strengths: _____

My accomplishments: _____

My current situation: (How do I feel about my present job?) _____

Things I would like to change: _____

SELF-EXPLORATION: FINANCIAL

My strengths: _____

My accomplishments: _____

My current situation: (Am I secure? Are my income and expenses balanced the way I want them to be?) _____

Things I would like to change: _____

Brainstorming

A valuable way of exploring your values and goals is through brainstorming. In brainstorming, you give free flight to your ideas on a specific problem to be solved. Opening your mind in this way can be valuable. By just letting ideas flow without judging them, you will generate many times the ideas produced through the normal reasoning process. After the abundant ideas have been generated, you can go back to evaluate their usefulness.

Brainstorming unleashes all the creative capacities in our minds. It does this by removing the restrictions and guidelines under which we have been taught to operate. The “rules” for brainstorming are as follows:

- **Suspend all judgement.** This is a time to remove your internal censor. Nothing is unimportant or too silly to include when brainstorming.
- **Think quantity, not quality.** The more ideas you generate, the better the chances are of hitting upon something new and useful. Bad ideas can always be thrown out later.
- **Extrapolate and cross-fertilize.** No matter how nonsensical it may seem, take your ideas to the nth degree. Combine ideas in unusual ways to stimulate new ideas.
- **The wilder, the better.** This is a time to be “way out.” Some of the best ideas are unconventional ones.
- **Evaluate later.** Do not close your mind to any suggestions. Let the ideas percolate. An idea that seemed ridiculous yesterday may be ingenious tomorrow.

To brainstorm, find a time when you will not be distracted. Sit comfortably with a pencil and paper. The purpose of the brainstorming session should be stated in the form of a question or a problem to be dealt with. The question must be specific, such as, “How can I increase my inventory of prospective buyers?” Once the question has been posed, you should immediately begin jotting down ideas. It is important to record the first thing that comes to your mind. Do not judge, write! Make notes in brief phrases to save time. After a pre-determined time limit, you can fill in the details of your notes.

Brainstorming can be done alone or in groups. If you are working alone, a tape recorder is faster than taking notes. Again, speak only key words and phrases. Do not worry about explanations now. You will know what you were talking about when you listen to the tape later.

After you have finished, review your notes. Examine all the possibilities as they come up. Discard unusable ideas only at the end. It is important and worth repeating that you should suspend all judgment during this exercise. Often wild and crazy ideas, when put together or altered slightly, turn out to be novel, effective solutions. So let yourself go. This is a time to have fun with a creative challenge. You will find that you have a broader range of choices after brainstorming than you thought possible before.

Now that you see how the process works, there is no excuse not to do it. Pose a question to yourself. Write it at the top of a sheet of paper and then take three to five minutes to come up with as many ideas as possible. Be sure to put yourself on a time limit and aim for quantity, not quality. Take the time now to complete this exercise. Have fun with it!

Can you see how the ideas flow when you let down your defensive censor? Perhaps you even felt a little silly writing down some of the ideas. Would you feel self-conscious if someone read what you wrote? Fear not, we all have those feelings when we first try brainstorming.

When considering your life's goals, apply the brainstorming process to your goals in each of life's key areas. Brainstorm each category using the rules we have just discussed. When doing such an exercise, allow approximately two minutes per category, using one page per category. Again, shoot for quantity and let your imagination take over.

Once you have finished, review what you have written and add anything you might have forgotten. When you are satisfied with your responses, look them over and circle the one idea under each category that stands out as being most important. Do not worry about what others might think or what is socially acceptable. Such an exercise allows you to see your goals in black and white, on paper, where they should be.

GOAL SETTING ACTION PLAN: MENTAL

What are my mental (intellectual) goals in life? _____

What are my mental goals for the next three years? _____

What would my mental goals be if I had only six months to live? _____

GOAL SETTING ACTION PLAN: PHYSICAL

What are my physical goals in life? _____

What are my physical goals for the next three years? _____

What would my physical goals be if I had only six months to live? _____



GOAL SETTING ACTION PLAN: FAMILY

What are my family goals in life? _____

What are my family goals for the next three years? _____

What would my family goals be if I had only six months to live? _____

GOAL SETTING ACTION PLAN: SOCIAL

What are my social goals in life? _____

What are my social goals for the next three years? _____

What would my social goals be if I had only six months to live? _____

GOAL SETTING ACTION PLAN: SPIRITUAL

What are my spiritual goals in life? _____

What are my spiritual goals for the next three years? _____

What would my spiritual goals be if I had only six months to live? _____

GOAL SETTING ACTION PLAN: CAREER

What are my career goals in life? _____

What are my career goals for the next three years? _____

What would my career goals be if I had only six months to live? _____

GOAL SETTING ACTION PLAN: FINANCIAL

What are my financial goals in life? _____

What are my financial goals for the next three years? _____

What would my financial goals be if I had only six months to live? _____

After completing your review, you should have seven circled semi-finalists” from the seven groups. Whether or not there is repetition is unimportant. Examine the seven goals, disregarding which group they came from, and choose the three that are the most pressing to you. Write those three on a separate sheet of paper with the title, “My Three Most Important Goals.”

The three goals listed on your separate sheet of paper represent the most important goals in your life at this time. Naturally, your circumstances change from day to day and from year to year. Rarely will a goal endure for your entire life. Whether your goals are short-term or long-range, you can see that such an exercise causes you to identify those things most important to you at this moment.

With all the insight you have at hand, create a hierarchy of goals from the lists compiled. As valuable as it is to isolate your most precious goals, it is equally important to set out some less substantial goals for which to strive. So take the seven categories and list all the secondary goals that you feel are worthy of action. You now have a better idea of where you are and where you would like to be in every facet of your life.

As an example, here is a list that someone might compile:

Career Goals: Make three more sales per week; get a promotion; start my own business; earn an MBA degree.

Family Goals: Visit or call Mom and Dad once a week; spend ten minutes more each day with my spouse and each child.

Spiritual Goals: Practice mindfulness meditations daily; go to church once every week; be more helpful to people every day.

Social Goals: Go to weekly club or organization meetings; socialize with more businesspeople and exchange ideas.

Mental Goals: Stop worrying so much about money and success; improve my memory of names; increase my vocabulary proficiency; broaden my general knowledge.

Physical Goals: Eat less junk food; do stress reduction exercises every night; floss my teeth every night; maintain an ideal weight.

Financial Goals: Own my own home; purchase a sports car; provide for an ample retirement fund by the time I am 60 years old.

Goal Setting Rules

When you have uncovered some goals, it is important to put them in a workable form. Certain rules need to be observed in order to make them effective. Goals must be:

- ✓ Personal
- ✓ Specific
- ✓ Positive
- ✓ Challenging
- ✓ Written
- ✓ Realistic

When most people are asked, “What are your goals in life?” they respond with something like, “To be happy, healthy, and have plenty of money.” On the surface, this may seem fine, but as goals that lead to actions, they are not sufficient. For goals to be effective and workable, they must meet the following rules:

1. **A goal must be personal.** This means that your goal must be something you want to do rather than something that you think you should do. Know your reasons for having the goal. Whether you want to achieve something for status, money, or good health is secondary as long as you want it badly enough to work hard for it.

2. **Your goal must be positive.** It is an automatic response to think of the thing you are told not to think about. This is because the mind cannot not think of something when told to do so. We tend to focus on ideas and actions from a positive framework. When you think a negative thought such as, “I will not smoke today,” your mind perceives it as “I will smoke today.” You end up thinking more about smoking than if you had phrased it differently. “I will breathe only clean air today,” is a statement that serves the same purpose and is more effective.
3. **Your goal must be written.** Written goals take a jump in status from being nebulous thoughts to bona fide entities on paper. Their being written serves as a visual reminder and thus continually reconfirms their importance. They gain credibility just from being written. We have been trained from childhood to give credibility to written statements. This can be seen in the statement from the movie, The Ten Commandments: “So let it be written, so let it be done.” When things are “put in writing”, they become official in our minds. A written goal strengthens our commitment to accomplish it.
4. **Your goal must be specific.** If you set your goal by saying, “I will increase my income next year,” the chances are that you will not do it. You must be specific in order to avoid the lack of commitment that comes with being vague. A more workable and motivating goal would be, “I will increase my income next year by 10 to 15 percent.” This revised statement has several advantages. It defines the increase for which you are striving as well as the range of the desired increase. Giving yourself some leeway is more realistic than expecting to hit your goal exactly on the mark. If you increase your income 13 percent instead of 15 percent, you have still succeeded.
5. **Your goal must be a challenge.** A goal must motivate you to work harder than you have in the past. It must move you forward. Set your goals beyond your reach so that you will have to stretch a bit. The more you stretch, the more limber your goal-achieving abilities will become.
6. **Your goal must be realistic.** Everything is relative to time and space. What is unrealistic today may be totally within reason five years from now. For years it was believed that the fastest a man could run a mile was in four minutes. It was unrealistic to aspire to running any faster until Dr. Roger Banister broke the four-minute mile in 1954. Since then ~2,000 runners have done the same. In any field, we never really know what the upper limits are. How, then, do we define realistic?

For our purposes, the best definition must come from you and your values. You must ask yourself, “What price am I willing to pay to accomplish this goal?” You should always weigh the payoffs, and the sacrifices involved before coming to a conclusion. Realistic is ultimately your decision.

Now that you know the rules for setting goals, you can apply them to the goals you set for yourself. It would be a good idea to make some worksheets and use them for every primary and secondary goal you want to achieve. For each goal, do the following:

1. **Define your goal.** Your first task is to determine whether your goal meets all the requirements of the rules listed above. If it does, then write it as clearly as possible at the top of your worksheet.
2. **Examine obstacles that stand in your way.** This is a time to guard against negative assumptions and other self-defeating thoughts. Remember the definition of realistic. An obstacle blocks you only if you let it. You should also write down your innovative ways of overcoming obstacles.
3. **W.I.I.F.M.--What's in it for me?** Write down why you want to achieve the goal. What kind of payoff is motivating you?
4. **Plan your action.** You need to carefully list the steps you will take which will bring you closer to your goal. The smaller the increments, the easier they will be to accomplish. A German proverb says, "He who begins too much accomplishes little."
5. **Project a target date for your goal.** State your deadline in a range, such as, "between March 15th and April 1st." Think carefully about the amount of time you need. Too little time will increase the pressure and frustrate you. Too much time may reduce your drive.
6. **Know how you will measure your success.** Goals should be described in terms of the outcome of an activity rather than as the activity itself. This is part of being specific. Instead of saying, "I will be running more in four to six months," you could say, "I'll be running three miles instead of two miles in four to six months."

When using your worksheets,

- Fill them out completely and keep them visible!
- Put them in a place where you will see them every day.
- Check off items as you complete them.
- Use them to chart your progress and take pride in your accomplishments.

KEY GOAL ACTION PLAN: MENTAL

What is the goal I would like to achieve? _____

What are the potential obstacles that stand in my way? _____

Why do I want to achieve this? What's in it for me? _____

What is my action plan? How will I specifically achieve this goal? _____

What is my target date/deadline for achieving this goal? _____

How and when will I measure my success? _____

KEY GOAL ACTION PLAN: PHYSICAL

What is the goal I would like to achieve? _____

What are the potential obstacles that stand in my way? _____

Why do I want to achieve this? What's in it for me? _____

What is my action plan? How will I specifically achieve this goal? _____

What is my target date/deadline for achieving this goal? _____

How and when will I measure my success? _____

KEY GOAL ACTION PLAN: FAMILY

What is the goal I would like to achieve? _____

What are the potential obstacles that stand in my way? _____

Why do I want to achieve this? What's in it for me? _____

What is my action plan? How will I specifically achieve this goal? _____

What is my target date/deadline for achieving this goal? _____

How and when will I measure my success? _____

KEY GOAL ACTION PLAN: SOCIAL

What is the goal I would like to achieve? _____

What are the potential obstacles that stand in my way? _____

Why do I want to achieve this? What's in it for me? _____

What is my action plan? How will I specifically achieve this goal? _____

What is my target date/deadline for achieving this goal? _____

How and when will I measure my success? _____

KEY GOAL ACTION PLAN: SPIRITUAL

What is the goal I would like to achieve? _____

What are the potential obstacles that stand in my way? _____

Why do I want to achieve this? What's in it for me? _____

What is my action plan? How will I specifically achieve this goal? _____

What is my target date/deadline for achieving this goal? _____

How and when will I measure my success? _____

KEY GOAL ACTION PLAN: CAREER

What is the goal I would like to achieve? _____

What are the potential obstacles that stand in my way? _____

Why do I want to achieve this? What's in it for me? _____

What is my action plan? How will I specifically achieve this goal? _____

What is my target date/deadline for achieving this goal? _____

How and when will I measure my success? _____

KEY GOAL ACTION PLAN: FINANCIAL

What is the goal I would like to achieve? _____

What are the potential obstacles that stand in my way? _____

Why do I want to achieve this? What's in it for me? _____

What is my action plan? How will I specifically achieve this goal? _____

What is my target date/deadline for achieving this goal? _____

How and when will I measure my success? _____

Visualizing

Visualization is an indispensable tool in helping people attain their goals. Musicians and athletes have proven that visualization is an effective substitute for real practice. In visualizing your goals, you will live your accomplishments in your mind's eye. The more of the five senses that you can involve in this exercise, the greater your chances are of accomplishment.

For example, you may want to be the Employee of the Year in your company. You know that each year an awards banquet is held during which a plaque is presented to the year's top employee. You may choose to focus on this banquet for your visualization exercise. Here is what you do:

Make yourself comfortable. Close your eyes and relax. Slowly and systematically, go through all of the five senses. Imagine what you would be experiencing at the banquet.

Sight. Imagine what you would see there. You would see other employees and their spouses. Imagine what they are wearing. You would see tables decorated and waiters scurrying about. You would see the bar and people standing around talking. Keep expanding what you "see" for several minutes.

Sound. What would you hear? You would hear the chatter of people. You would hear laughter, the tinkling of glasses, music from a band, and people talking. You would also continually hear people coming up to congratulate you. Imagine that!

Smell. Imagine all the smells you would experience: women's perfume, men's cologne, food, the smell of floral decorations, fresh air in the woods or on top of a mountain. What else?

Feel. What would your tactile sensations be? You would feel people rubbing up against you in the crowded room. You would feel others shaking your hand. What else?

Taste. Taste in your mind the champagne you will be drinking. Taste the food you will be eating. Experience the sweet taste of success -- in advance!

Most importantly, imagine the exhilaration you will feel when your name is called to receive the award! Take your time during this exercise and enjoy it. The more you can "visually" attend this banquet, the more motivated you will become.

To aid in your visualization exercise, you might want to start a visualization file. This is an envelope or file into which you put pictures, clippings, letters, and other reminders of what it will be like to succeed. Your file should

also contain letters or awards that you have received in the past. Anything that makes you feel good about yourself can be included in the file. It can then be used as a source of motivation and inspiration, especially if you begin to feel a little down or demotivated. Better yet, you can also make a vision board you can more often see, adorned with these motivating items. We all need to be reminded of our accomplishments occasionally. Be your own best friend -- remind yourself!

Role Models

Many people concentrate only on the goal they wish to attain but there is more to the picture. Successful people in every field have certain characteristics in common. These common characteristics do not occur by chance, they are an integral part of goal attainment. It is worth your time to analyze the constructive characteristics of people who are now where you would like to be.

One effective method is to choose role models. These are people to admire and emulate. Your choices can include people who are dead or living as long as you are familiar with their personalities and accomplishments.

Elon Musk often draws inspiration from innovators including Thomas Edison and Nikola Tesla, for their relentless curiosity, problem-solving abilities, and willingness to challenge the status quo. These traits helped him shape groundbreaking ventures like Tesla, SpaceX, and Neuralink. By emulating the innovative spirit of these role models, Musk finds direction and motivation to tackle some of the world's most complex challenges. This highlights the power of choosing role models to inform and inspire your path to success.

In choosing a role model, several things must be kept in mind:

1. **Keep them off the pedestal.**

There is no doubt that you will choose people whom you see as being “above” you because of what they have accomplished. That is good. What is not good is to put them on a pedestal, thereby making them larger than life. We are all human. We all have strengths and weaknesses. You must not lose this perspective on people. Putting them on pedestals only further separates you from them.

2. **Isolate their strong points.**

You need to look at that person you wish to emulate and analyze the precise qualities he or she possesses which you need to acquire. Sit down and write out the characteristics that seem to encourage their success. Use concrete examples of their behaviors that you can adapt to our own situation.

3. **Remain yourself.**

Quite often, the tendency when admiring someone is to try to become his or her clone. People who seem to “have it all together” have done all the “work” for you. It seems that all you have to do is imitate them. This is a dangerous way to think because you are not working on your own personality. In the final analysis, you are you. It is impossible to become exactly like someone else. Moreover, why should you want to? Remain yourself while you acquire new traits to help you achieve your goals.

Sometimes it is helpful to have a symbol of another person's virtues. This symbol will actually remind you of that person and his or her qualities. It can take the form of a picture, a possession (e.g., your father's pocket watch), or some abstract thing, such as a rock. It will be useful as long as it makes the association in your mind.

Multiple models

A workable system of role modeling is to examine the traits of several people whom you admire. This will help you avoid hero-worshipping. Write down their virtues as you did before, without identifying to whom they belong. When you are with these people, look for more behaviors that reflect their success. The best models are successful people in your own field. Their behaviors are directly translatable to your life and will have more meaning to you.

Questions to ask. Acquiring good habits from others will accelerate you towards your goal. Ask yourself these questions to get the most out of your role models:

1. What would they do in my situation?
2. What do they do every day to encourage growth and to move closer to a goal?
3. How do they think in general? In specific situations?
4. Do they have other facets of life in balance? What effect does that have on their well-being?
5. How do their traits apply to me?
6. Which traits are worth working on first? Later?

Mentors

A mentor is someone you admire and under whom you can study. Throughout history, the mentor-protégé relationship has proven quite fruitful. Socrates was one of the early mentors. Plato and Aristotle studied under him and later emerged as great philosophers in their own right. Mentors are worth cultivating if you can find them.

The same cautions hold true here as for any role model. It is better to adapt their philosophies to your life than to adopt them. Be suspicious of any mentor who seeks to make you dependent on him. It is better to have him teach you how to fish than to have him catch the fish for you. That way you will remain in control.

Under the right circumstances, mentors make excellent role models. The one-to-one setting is highly conducive to learning as well as to friendship.

Role Playing

Role-playing is like acting. You define a desirable behavior and then act it out for practice. Since “practice makes permanent,” role-playing will help you master new behaviors. It can be done alone or with a partner and need not take more than a few minutes. Like anything else, the more you do it, the better you will become.

One form of role-playing would be to get together with a friend and “play-act.” Define a situation and the desired behaviors. Then run through it, trying your best to act as you would like to in real life. For example, let’s say you want to learn to relax more as a salesperson. You and your friend would set up a situation in which you play the salesperson and your friend plays the buyer. You would then interact with the “buyer” in ways that allowed you to relax more than you have in the past. You would practice using more eye contact, holding your body in a relaxed posture, listening more, joking with the “buyer,” and so on. Afterward, you and your friend would discuss how each of you felt during the exercise. You would repeat this repeatedly until you have made some progress. Role-playing is an excellent way to introduce new behaviors in a relaxed, non-threatening atmosphere.

It seems that we are forever returning to the fact that we need to change our thinking. Perhaps this is so because our obsession with negative thinking is so great (and so great an impediment to our progress).

Role-playing through visualization is an effective way to change our thoughts. Imagine a situation and how you previously felt in it. You then think of more positive thoughts and feelings and practice using them in problematic situations.

For example, when I was a young salesperson, I had a fear of asking people for appointments. My typical thoughts in that situation were, “Why should I ask, he’s going to reject me,” or, “If he rejects me, I will be devastated.” I started Role-playing new thoughts in the old situation. Instead of his negative assumptions and negative thinking, I substituted, “I’m going to ask because I have as much of a chance of being accepted as rejected. I am going to expect acceptance and will get it. I am not going to invite rejection through my attitude. Moreover, if I do get rejected, big deal! It’s not the worst thing in the world!” Through visualization, I practiced and in real life became able to relax and approach more people for appointments.

Role-playing new behaviors can also be done through visualization. Instead of imagining what you would think and feel in a situation, you imagine what you would do. In your mind, you can change the undesirable behaviors and have the new behaviors carry over into real life.

The Affirmation Card

The affirmation card is a tool that you can use on a daily basis to help you become the person who will achieve your goals. It breaks down those goals into daily actions that are bite-sized and easy to do. By showing you the steps along the way, the affirmation card will keep you from being overwhelmed by your lofty goals.

There are three rules for using the Affirmation Card:

- **Read the Affirmation Card every day.** It is best to read it both in the morning when you rise and in the evening when you retire. Repetition is an integral part of learning and will help you stay on target.
- **Avoid associating with people who drag you down emotionally.** Associate with people who are positive and from whom your optimism can grow.
- **Make it meaningful.** Read and fill out the card sincerely; do not just go through the motions. You will be kidding no one but yourself.

Primary Goal

In the first section of the Affirmation Card, write your primary goal. Write out as explicitly as possible that goal which is strongest and affects your motivation the most now.

Daily Growth

The second section of the card is for writing in the characteristics that you are developing. Write out five key characteristics that you need to develop to achieve your goal. State these personal characteristics in ways that adhere to the rules of goal setting.

Action Plan

The third section of the card is the action section. Here you will write out the “minimum daily standards” which you will perform every day to move you closer to your goal. Again, be specific.

The following are some examples of minimum daily standards:

Mental: I will spend 15 minutes every evening doing visualization exercises.

- **Physical:** I will do a minimum of five push-ups and ten sit-ups every morning.
- **Career:** I will read something related to my career for at least 15 minutes before going to bed.
- **Financial:** I will keep a complete record of every expense.
- **Spiritual:** Each day I will do one good deed to help someone less fortunate than I.
- **Family:** I will relax over dinner and enjoy a meaningful conversation with my family.
- **Social:** I will take time to call one of my new friends.

Read the affirmation card twice a day until everything becomes a habit. Once you have developed constructive habits, you can move on to new behaviors. Fill out a new card and practice the new challenges every day until they become habits. In this way, you will painlessly move closer and closer to your goals.

There is more to life than constantly working, although we all know many managers who would argue that point. The fact is that having a balanced life will not only make you happier, it will make you a better well-rounded person.

Ultimately, it all comes down to some simple truths:

"The secret of success is constancy of purpose."

"Successful people don't do extraordinary things; they do ordinary things extraordinarily well."

"Success is the sum of small efforts, repeated day in and day out."

"The secret to winning is constant, consistent management."

"Learn as if you will live forever, live like you will die tomorrow."

"Stay away from those people who try to disparage your ambitions. Small minds will always do that, but great minds will give you a feeling that you can become great too."

SUMMARY

The emphasis of this eWorkbook was the discussion of several influences on one's life that can be positive or negative depending on the individual, and the introduction of several suggested processes to follow that can lead to both a more successful career and a happier life in general.

Creating balance among the seven need categories in our lives is particularly important, for every category can positively or negatively affect the others depending on the attention or lack of attention it receives. These seven categories are: Mental, Physical, Family, Social, Spiritual, Career, and Financial. To begin a career effectively, we must work at bringing our lives into balance. This requires goal setting -- the identification of the results we want to achieve for every facet, every need category, of our lives. Only then can we plan the concrete steps and intermediate goals that stand between our present situation and our ideal concepts of ourselves.

People who have a clear set of goals in life exude a sense of purpose and determination, are taken seriously by others and are respected by their peers. In contrast, those who have no goals exist feeling emotionally, socially, spiritually, physically, and professionally unbalanced, causing anxiety. To be successful on the job and in life, we must identify our goals and map out the steps that will allow us to reach those goals. Choices become infinitely easier to make when we know the direction we are following in our lives and in our careers.

Our basic assumptions can have a positive or negative effect on our behavior, thus affecting both our careers and lives in general. More often than not, it is our assumptions that limit our perceived options. Negative assumptions, which set up internal obstacles that can automatically defeat us, usually become self-fulfilling prophecy. We assume we cannot do something and then act in ways that guarantee our failure that in turn reinforces our original assumption. Our negative assumptions, therefore, must be replaced by positive assumptions that can in turn receive positive results.

Brainstorming is a valuable way of exploring our values and goals. It gives “free flight” to our ideas on specific problems to be solved. Ideas flow freely without being judged; thus, many more ideas are generated than through the normal reasoning process. After abundant ideas have been generated, we can review the list and evaluate each one’s usefulness. The initial aim is for quantity, not quality.

Brainstorming can be used to determine our most important goals in the seven need categories. Through a process of review and elimination, the three most important goals for immediate attention can be determined, with others that also warrant action becoming our secondary goals. Such an exercise gives us a better idea of where we are and where we would like to be in every area of our lives.

When setting goals for action, we must remember the rules for goal setting: goals must be personal; they must be positively stated; they must be written; they must be specific; they must be a challenge; and they must be realistic.

Visualizing is an indispensable tool in helping us attain our goals. It is a process through which we live our accomplishments in our mind’s eye. The more of the five senses that we involve in the process, the greater our chances of actually accomplishing that which we visualize.

Role Modeling is the process of selecting successful individuals of the present or of the past whom we admire and wish to emulate, analyzing the characteristics of those individuals that we believe led to their success, and incorporating those characteristics through practice into our own lives. When selecting role models, it is important to keep in mind three things: keep the role models off pedestals; isolate their strong points; and remain ourselves.

In working toward achieving our goals and making positive changes through role modeling, it is especially helpful to create a Affirmation Card which should be reviewed a minimum of twice a day. On it is written our primary goal, five of the positive characteristics we are trying to

A balanced life achieved through processes that help us identify and reach our goals will not only give us happier lives, but will make us more successful, more effective people.

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