



Name _____

Date _____

Year End Evaluation & Goal Setting

1. **WINS**

Over the past year, what were your wins, accomplishments, breakthroughs, successes?

What patterns or themes can you see?

What strengths did you rely on?

What kept you going when it got tough?

What made it fun?

What synchronicities assisted you?

2. **LOSSES**

Over the past year, what were your losses, failures, disappointments, breakdowns?

What patterns or themes can you see?

What resources are available to help avoid similar results in the future?

3. LESSONS

What did you learn about life or yourself over the past year?

What can you do to lock-in and sustain the achievements and learnings of the past year?

4. PROJECTION

Project your vision to the end of the next year. *Looking "back" over next year*, what were your wins, accomplishments, breakthroughs and successes in each of the categories listed below? Describe them as already done (past tense).

PHYSICAL ENVIRONMENT:

CAREER:

MONEY/FINANCES:

HEALTH:

FRIENDS & FAMILY:

SIGNIFICANT OTHER/ROMANCE:

PERSONAL GROWTH:

FUN & RECREATION:

5. SMART GOALS

Now go back and create at least one "SMART" goal for each of the above 8 categories. A SMART goal is defined and illustrated below:

Specific - describe it in detail. Don't just use words like "good, nice, better, more, happier," but include a description of what that would look like.

Measurable - identify a way to measure your progress. Find a manifestation of that state that can be counted or otherwise quantified.

Actionable - make sure you can actually do something to influence the occurrence of the desired outcome. A goal of having 15 more sunny days in your hometown is probably not actionable.

Realistic - choose something that is a stretch, but still in the realm of reality for you. Increasing your net income by \$10 million this month might be possible (by robbing a bank, winning the lottery, etc.), but it's not very realistic.

Time-based - set a time by which you intend to accomplish your goal which is distant enough to be realistic, but close enough to get you into action.

Here is an example of changing a nebulous goal into a SMART goal.

Nebulous goal: have more influence on the management policies of our firm

SMART goal: get 2 of my suggestions for implementing better performance evaluations at the firm initiated by June

My SMART Goals:

PHYSICAL ENVIRONMENT:

CAREER:

MONEY/FINANCES:

HEALTH:

FRIENDS & FAMILY:

SIGNIFICANT OTHER/ROMANCE:

PERSONAL GROWTH:

FUN & RECREATION:

6. RESOURCES

With regard to each of your SMART goals, identify the resources you have available to assist you with information, expertise, funding, support, etc. Try to come up with at least one resource in each of the following categories for each goal:

FAMILY & FRIENDS:

FRIENDS OF FRIENDS:

BUSINESS ASSOCIATES:

SERVICE PROVIDERS:

(ex: lawyers, bankers, therapists, florists, bookkeepers, doctors, house sitters, teachers, coaches)

TRADE OR INDUSTRY ASSOCIATIONS:

RESEARCH/EDUCATION FACILITIES:

(ex: internet sites, libraries, colleges, continuing ed programs, leisure learning programs)

ORGANIZATIONS:

(ex: church, alumni group, non-profits)

7. ACTION PLANS

Choose one SMART goal and break it down into the major projects that will need to be accomplished to achieve the goal.

PROJECT 1:

PROJECT 2:

PROJECT 3:

PROJECT 4:

Now take the first Project in the sequence and break it down to the action steps necessary to accomplish the Project. Remember to take advantage of the success strategies you identified above.

- 1.
- 2.
- 3.
- 4.

What is the very first, smallest action step that must be taken for the first Project?

Put that on your task list in Outlook, your PDA, legal pad, or wherever you keep your daily to-do's.

Look! You are already moving toward your goal! You have broken the actions down to manageable chunks. Don't worry if there are holes in your plan because you don't quite know how to accomplish some parts. Just "go to the edge of the light you see" and it will become clearer as you progress.