

YEAR REVIEW AND GOAL SETTING TOOLKIT

FOCUS ON WHAT MATTERS

Do you ever find yourself rushing from one place to the next or between tasks? Do you feel as though there just aren't enough hours in the day to even get halfway through your to-do list? The scatter-gun approach is never going to work. It's time to focus on what really matters to you.

W E L C O M E

Whether you've been in business a while or you're just starting out, it's not unusual to find yourself feeling adrift. Maybe you're working hard and doing all the right things, but you just don't seem to be getting anywhere worthwhile?

Often, people feel this way because they haven't spent enough time thinking about where they're going, and they don't know how to set goals to get them there.

Why Set Goals at All?

Goal setting is a powerful process for visualising your ideal future and motivating you to make it a reality. When you know what you want to achieve, you know where to concentrate your efforts and spend your time. By setting clearly defined goals, you can measure and take pride in their achievement. This helps you recognise forward progress and encourages you to keep going.

Get Clear on Your Values

For your goals to be achievable, they must move you towards things you want. It sounds obvious, but it's easy to be seduced by other people's ambitions and mistakenly assume you want the same things.

The key is to get really clear on your personal values and set goals that align closely with them. Values are the things you believe are important in the way you live and work. They should determine your priorities and help you measure whether your life is turning out the way you want.



Big Goals and Short-Term Goals

Have you ever heard the saying, 'if your dreams don't scare you, they're not big enough'? There may be some truth to this, but I believe modest goals are important too. In fact, most people need a mix of both big and small goals to build the kind of life they're dreaming of.

When we're setting goals and figuring out how we're going to achieve them, it can be helpful to start big and get smaller. Breaking large, long-term goals down into smaller AKA (short-term goals) creates a clearly defined path for you to follow. Moving from one small goal to the next keeps you motivated and pushes you closer to achieving your biggest dreams.

LET'S GET STARTED

There's a lot in this toolkit but please don't feel daunted. It's a resource to guide you through the three important stages of setting goals for the forthcoming year:

1. A review of last year
2. Some important daydreaming - what would you love the future to look like for you, your life and your business?
3. Setting specific goals that matter to you. Not goal setting for goal setting sake but goals you would be disappointed if you DIDN'T achieve.



So dive in and if you need my help or would like to book in a personalised one-to-one goal planning session with me, just let me know.

Val

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REVIEW OF LAST YEAR

What were the highlights of last year for you, both in your business and personally?

Who did you most enjoy working with?

What were your biggest challenges?

REVIEW OF LAST YEAR

What was your turnover for the year?

What was your profit/loss for the year?

What was your personal income for the year?

How do you feel about your current pricing and profit levels?

WHAT LIGHTS YOU UP?

For this next section allow yourself 10 minutes or so of quiet time and write your answer in the spaces below. Don't analyse just write! If your answers seem overly simple, it's a good sign.

Think back to your childhood – what were you doing when you were most happy? Think about your 5 senses; sight, hearing, touch/feel, smell and taste - you could come up with one joy for each sense.

Examples include watching children playing, taking a walk in a beautiful open space, cooking, watching the world go by enjoying a good coffee, telling someone you love them, fresh sheets on the bed or something completely different! Whatever it is – the things you write down will be unique to you.

Now answer the question, "What are my Top 10 joys in life/What light's me up?"

Continue onto the next page if you need more space for your Top 10

WHAT LIGHTS YOU UP?

Continue here if you need more space for your Top 10

I wonder what you notice as you look at your list. What common themes, powerful messages or surprises can you see? How easy are they to do? Why do you think you don't do them more often?

Perhaps you're already thinking of ways you can bring some of these ideas into your life. Write below one specific action you will take to bring more joy into your life:

REVIEW OF LAST YEAR

What's the one thing you want to change about your business?

What's the one thing you want to change in your life?

What's the main obstacle to making the changes you've identified above?

TIME FOR A LITTLE DAYDREAMING!

Spend some time dreaming about and picturing your ideal future. Look ahead say 5 years from now.....Write down what it looks like and how it makes you feel. How does this image reflect and embody your values? Can you identify the things you need to do to make it a reality?

TIME FOR A LITTLE DAYDREAMING!

Now fast forward to New Year's Eve this year...

What would you like your business and life to look like? Where would you like to be? Who will you be working with? Where will you be working? What will you be wearing? Who will you be spending your time with and what will you be doing?

If I met you on New Year's Eve what would you tell me about this year? Include as much detail as you can below.....

GOALS FOR THIS YEAR

Money and Wealth Goals

Turnover/Sales

Profit

Personal Income

Sales Goals

How many of each of your main services/packages/products do you want to sell?

PR, Visibility and Marketing Goals

Where do you want to be seen and heard in 2024? Where would you like your work to be seen?

Online, blogs, etc.

Print

TV, radio, public speaking,
other

GOALS FOR THIS YEAR

Write below the Goals you want to achieve in 2024. Be sure to include business and personal goals. Think about what would you be disappointed if you DIDN'T achieve.

Be SPECIFIC:

The more specific you are, the easier it will be to keep steering in the right direction - and the easier it will be to achieve.

WHAT would you be disappointed if you DIDN'T achieve?	WHY Bother - What outcome are you looking for? WHY do you want this goal? What are the BENEFITS to you?	WHEN will you achieve it by? A date to aim for & inspire you, not beat yourself up with
ONE		
TWO		
THREE		
FOUR		
FIVE		
SIX		