



SMART

Goals



Goal-Setting & Action Planning Guide

SMART Goals

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SMART Goals

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Background

Whether you're interested in goal-setting tips for you, your business, or to gain a deeper understanding of goal-setting to help your clients more, this SMART Goal- Setting & Action Planning Guide can help.

Starting with a quick overview of the SMART Acronym, this guide goes deeply into each element of SMART, with examples, and finally some additional tips to help you and your clients set well- rounded *and* SMART Goals and Actions!

SMART Principles Overview

SMART Stands for:

- **S**pecific (Being clear and specific makes goals and actions easier to achieve- and start!)
- **M**asurable (Helps you know when a goal or action is complete and measure progress)
- **A**ctionable (Means there are things you can DO- and that you have control over those actions)
- **R**ealistic (Prevents overwhelm and helps us breakdown bigger items into more achievable goals)
- **T**imebound (Something to aim at. A deadline helps us stay focused and motivated)

Quick SMART Goals Process Example:

If you had a goal to, "Get more sales", how would you know when you've achieved that goal? How would you measure progress/know you're on track? Let's look at how applying the SMART principle can help.

Starting goal: Get more sales

Make it Specific - Double the sales of my health eBook

Make it Measurable - Increase the revenue from my health eBook from \$10,000 to \$20,000

Is it Actionable and within your control? **3 Key Steps I can take include:**

- 1) Create a new, more exciting front cover
- 2) Create a marketing action plan eg: asking 25 friends to read and review it on Amazon
- 3) Increase the price from \$9.95 to \$12.95.

Make it Realistic - Increase the revenue from my health eBook from \$10,000 to \$17,500

Make it Time-Bound - **I would like to complete this goal by:** November 30th 2020

Final goal: Increase the revenue of my eBook from \$10,000 to \$17,500 by November 30th 2020.

IMPORTANT: Whilst SMART may seem like an acronym to follow one step at a time, when you apply it you'll find yourself jumping around. Be prepared to change your goal several times as you hone, refine and understand it more deeply.

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SMART Goals are Specific

Have you ever struggled to get started on a task because you don't really understand what it is, or the task seems too big and fuzzy?

Well, you're not alone! Many people struggle with getting started on their goals - simply because they haven't made their goals specific enough.

But it's well worth the effort: The more specific goals are, the easier they are to achieve! When we're clear on what we want, it makes it easy to make decisions and take action because we know exactly what we're trying to do.

"I always wanted to be somebody, but I should have been more specific." Jane Wagne

How making goals SPECIFIC makes them EASIER to achieve:

Example

Imagine your goal is to **buy a summer shirt**. You head off to the mall, and quickly get overwhelmed by the variety of stores, designs and patterns to choose from. Now instead, imagine you're shopping for a **plain white shirt with short sleeves and a collar**. As you browse you can now ignore coloured and patterned shirts - and can easily focus in on just the white, short-sleeved shirts. Now imagine your shirt **must also have at least one pocket and mustn't cost more than \$65**. You've just made your goal even more specific. Now you can eliminate expensive stores - and your shirt-shopping is even easier!

Example

A goal to "Streamline business processes" is hard to action. Where would you start? What does it mean? But if your goal is to "Create a one-page document which outlines the action steps for your Client Intake and Wrap-up process", now you have a clearer idea of what you're doing, and how to get started.

TOP TIP:

SMART is not just for Goals!

In order for you to be most effective both your goals and actions should be SMART.

After all, actions are really just small goals!

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SMART Goals are Measurable

How will you KNOW you've achieved your goal unless you can measure it?

If you can't prove you've completed the goal then it's not measurable - which means it's not a SMART goal. Measurability is a very important part of making your goals specific

Example

If your goal is to "Get more people signed-up for your newsletter" - how will you know you've succeeded unless you know where you are now, and what you're aiming for? Instead your goal could be to "Double your newsletter subscriber list from 250 to 500 people". This also allows you to track progress and adjust your action plan if it looks like what you're doing isn't getting the results you need.

More Examples

Change *Follow-up with prospects* → "Phone 5 warm leads from last weekend's workshop".

Change *Decrease my website bounce rate* → "Decrease my website bounce rate to 40%".

Change *Run more workshops this year* → "Run 3 free workshops and 3 paid workshops in the next 12 months".

Making Goals Measurable TIPS:

- One way to find your measure is to ask "Why am I doing this? Why bother?". This will help you identify why you're doing it - and to identify the measures you need to be sure your goals are successfully completed.
- Your measure could be a financial amount, a percentage increase or some kind of count. Note that for some goals and actions, the only measure is a "yes" or "no" to completion of the task, ie. Your new website is live, or you have registered your business name.
- If you don't know how to prove to someone that the goal is complete, then your goal measure is not specific enough. The "acid test" for measurability is to ask "How do I prove I've completed this goal?" So rather than "Create a new product" your measurable goal could be "The new product is available to buy on your website" and rather than "Finish my book", your measurable goal is "The final manuscript has been sent to the editor." Clear - and provable!

Measurability is important for Actions too (actions are really just small goals!)

Action Examples

Change *Write an article* → "Write a 750 word article for LinkedIn on how to set boundaries with your boss".

Change *Follow-up with your prospects* → "Phone each of the prospects (from the free seminar I ran) by the end of Friday this week".

Change *Practice coaching* → "Ask 50 friends and family if you can give them a free coaching session (and book a time with those who say yes)".

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SMART Goals are Actionable or Action-oriented

We can't control fate - or other people. For a goal to be SMART it must be actionable by us, and within our control. Otherwise it's not a goal, it's a wish!

"Winning the lottery" is therefore not SMART as the achievement of this goal is not within your control. However, the action of "Buying a lottery ticket" is fully within your control.

Actionable Goals:

Actionable goals are those you can DO something about ie. where there are a number of actions - within your control - that lead to achievement of that goal.

Example

Your goal is not to "Get potential clients to see what you offer as excellent value" (you have no control over what people think of you), but to "Write a document that lists my unique selling points and the benefits of my service to potential clients". This goal is now actionable both in terms of creating the document, and two follow-on actions could be, to "Add these selling points and benefits to the 'Why coach with me?' page on my website", and "Pick the 3 most powerful points and send them to my graphic designer to add to the back of my business card".

Action-oriented Goals:

Making a goal Action-oriented also encourages you to write ACTIVE and not passive goals. .

Example

Your goal is not to "Have a giveaway with newsletter sign-up on your website" (this is vague and passive and while loosely actionable, it is not action-oriented and does not inspire action). But your goal could be to "Write a one page special report on 7 ways to take better care of our feelings and add it as the newsletter sign-up gift for your website".

*"Even if you're on the right track
you'll get run over if you just
sit there." James Allen*

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SMART Goals are Realistic

It's important to feel GOOD about your goals. When we set ourselves a goal that's out of our reach we often end up feeling overwhelmed, we self-judge, and sometimes we give up altogether. Truly SMART goals feel good!

This means it's important to factor in existing commitments and lifestyle when setting goals. SMART goals and actions need to be challenging enough to inspire you AND realistic enough that you believe you can achieve it. It's all about setting yourself up for success.

Making Goals Realistic TIPS:

- **POSSIBILITY:** Is it physically possible to complete the Goal or Action in question? While stretch goals can be inspiring even if they're unlikely - this is rarely true if they're impossible!
- **CHUNKING DOWN:** Struggling with a big action or goal? Break it down.

For Goals ask, "What would be a great stepping stone?", "What goal could I set that would prepare me or give me knowledge or experience that will help me achieve this bigger goal?" and "What could I achieve in a month, 3 months or year that would get me closer to my dream?"

For Actions ask, "What could I start or spend a chunk of time on?" and "What would be an easy first step, preparation action, request for help or action to remove an obstacle?". You can break out the first step into an action or set yourself a target of working on something for a chunk of time like 1 day or 3 hours

- **COMMITMENT:** Make your action doable, ie. the right size so that you can commit to it 100%.
NOTE: Commitment is important - although it doesn't necessarily mean the goal or action will get done. Sometimes life gets in the way and opportunities or problems arise which prevent us from achieving what we set out to do. However, people CAN commit to achieving it.
- **SCORING:** One way to check-in as to how Realistic your goal is, is to score how likely you feel you will achieve your goals (out of 10). If your score is LESS THAN 8:
 - Your goal or action may be TOO challenging or large.
 - You may not feel connected enough to WHY you're doing it.
 - You may lack self-belief (which is an obstacle in itself)
 - There may be some other obstacles you haven't fully acknowledged or addressed yet

TOP TIP: When estimating, think carefully how long the action will realistically take. We tend to underestimate how long tasks will take, especially if we haven't done it before. A good rule of thumb is to double your first thought of how long the action or goal will take. And if you haven't done it before, try tripling or even quadrupling your estimate. It sounds extreme, but this is a great way to reduce stress - and surprisingly accurate.

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Creating a RANGE of Goal Achievement Levels

One way to make a goal realistic, is to create a RANGE of goal achievement levels. Having a goal completion RANGE is a great way to take the pressure off, while still inspiring yourself with a stretch goal.

- **Minimum- This should be relatively EASY to achieve.** Set a level that is EASILY achievable this year. After all, life sometimes does throw unexpected things our way - positive opportunities, charming distractions and painful experiences!
- **Target- This is your IDEAL level.** What would be a good level to aim for - enough of a stretch to be interesting, but not so much of a stretch that you find yourself switching off or avoiding it?
- **Extraordinary- This is your STRETCH level!** What would be amazing, brilliant, wonderful? Put in a measure here where you would say, "Wow, that is fabulous!" . NOTE: Be sure that your measure here is POSSIBLE, even if it is not PROBABLE.

GOAL RANGE Achievement EXAMPLES:

The range you use could be DATES, for example:

- Minimum level could be completion by - December 31st
- Target level could be completion by - September 30th
- Extraordinary level could be completion by - June 30th

Your range could also be NUMERIC - a \$ amount, percent or a count. For example:

- Minimum = 250 Facebook likes, 1 new client a month, \$1000 in sales/month
- Target = 500 Facebook likes, 3 new clients a month, \$2000 in sales /month
- Extraordinary = 750 or more Facebook likes, 5 new clients a month, \$5000 in sales/month

*"If you have built castles in the air,
your work need not be lost; that
is where they should be. Now put
foundations under them."
Henry David Thoreau*

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SMART Goals are Timebound

WHY?

SMART goals and actions are always Timebound ie. they have a date by when you plan to complete them. Without a date there is less incentive to work toward our goals - what are we aiming at? We're all so busy - how are we going to fit more activity into our lives, how do we know how to prioritise our activities unless we have a deadline to know this goal/action is important to us?

Also, an action plan to achieve a goal will be very different in terms of effort, solutions and help required if the deadline is a month from now, as compared to a deadline of one year from now. Setting a date allows people to work backwards and figure out an appropriate action plan.

A date also gives us the opportunity to visualise completion. It allows you to imagine that time in the future when you have completed it- and that helps you commit to the goal!

With Annual Goals you already have an automatic "deadline" of December 31st. Sometimes the date is fixed or imposed on us for example if we are booked to deliver a workshop on a specific date. And sometimes we choose a date, just so we have something to aim at.

Making Goals Timebound TIPS:

- Pick a date that inspires you, but that is not so challenging that you feel overwhelmed.
- Different dates may also represent the relative priority or urgency of different actions ie. a goal or action that has a completion date of 31st March is likely to be higher priority than a goal with a completion date of September 30th.
- For each goal, you can give yourself a RANGE of completion dates (Minimum, Target and Extraordinary) as detailed under the "Make it Realistic" above.

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Beyond SMART

The SMART model is great - and a helpful reminder. But it doesn't cover everything!

BEFORE Setting Your SMART GOAL, here are 7 things you should also consider:

- 1. Is the goal stated in the POSITIVE?** We tend to get what we focus on. Whenever we say "I want to stop biting my fingernails" our brain has to first build a picture of what we DON'T want - in order not to do it. Make sure your clients are working towards something, rather than focusing on what they don't want.
- 2. Is the goal stated in the PRESENT TENSE.** This helps the brain to assume you will be successful!
Eg. On 30th September I have healthy fingernails/have a new job/am running a mile in 8 minutes.
- 3. Have you explored the WHY?** "Why" your client wants their goal is the key to staying the course. What are their expected goal outcomes? What will 'come out' if they achieve this goal? Clearly understanding WHY they want their goal makes people more excited to work on their goals. It also gives extra motivation to push through challenges and persevere when things gets tough.
- 4. Also consider the wider BENEFITS** this goal will give you. This is much broader than outcomes and could include how you will feel, impacts on your work, personal, family or social life and more! Drill down and ask your clients to list as many benefits as they can think of to achieving their goal. Knowing the broader "benefits" of your goal can help you be more inspired to work on your goal, and go the extra mile.
- 5. The PAIN of NOT Achieving.** We tend to be more motivated to action by avoiding pain rather than seeking pleasure. What is the pain of NOT completing this goal? A really interesting part of goal-setting can be to explore how you will feel, what you may NOT get, if you don't achieve your goal. Helping your client get clear on the pain of NOT achieving their goal can also be a helpful reminder and powerful action motivator.
- 6. Is the goal in line with your VALUES?** The more a goal aligns with your inner or core values, the EASIER it will be to achieve. NOTE: While we can achieve goals that don't align with our values it's harder to do, more stressful and less satisfying.
- 7. Finally, help your clients envision how they will FEEL** once this goal is complete. This is a big part of the "Why", motivating us at a more sub-conscious level. Sometimes exploring desired "feelings" causes wonderful modifications to the goal eg. bringing in the timescale as people get inspired, or changing the goal measure for something more meaningful

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The **LAST** Word

When you know exactly what you're working towards and why, goals are fun and inspiring. When goals are clearly defined, they're easier to get started, take action, stay motivated - and ultimately succeed!

But SMART is not just about describing your goals and actions as Specific, Measurable, Actionable, Realistic and Timebound. We need to BE smart about our goals.

1. Work hard, but know when to rest. Forgive yourself - for what you don't yet know, for your mistakes and what might get in the way.
2. Be kind to yourself! Know that we tend to over-estimate what's achievable in a shorter time-frame, and under-estimate what we can achieve over a longer period.
3. Anytime the goal isn't working for you, change the goal! The best goals flex when they need to.
4. Remember that SMART is for Actions too!
5. More important than hard work, determination and perseverance are essential qualities for achieving bigger goals! Keeping going when the going gets tough is what sets you apart from the crowd. It also builds self-confidence, resilience and makes you proud of yourself.

Finally, remember:

GOALS are there to INSPIRE YOU, not to beat yourself up with!

Now that's SMART!

"Sometimes success is due less to ability than to zeal"
Charles Buxton