

A person's hands are shown holding a spiral-bound notebook. The left hand is on the left side of the notebook, and the right hand is holding a pencil, poised to write. In the background, there is a green cup of coffee with a heart-shaped latte art. The scene is set on a wooden table with a blurred green plant in the background.

# GOAL SETTING & GETTING WORKBOOK

CREATED BY

*Joan Jakel*





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# Welcome!

I'm excited you're here to explore your goals and tap into the tools to help you achieve them.

In this workbook, you will define your goals, envision them in detail, create a plan to bring them to life, determine who you need to become to achieve them, create a supportive environment to focus on them and learn some productivity hacks to keep you on the path to success.

## **You will learn how to:**

- Identify your Personal and Business Goals
- Define each goal as a SMART goal
- Discover the "Why" behind your goals
- Monitor them annually, quarterly, monthly & daily
- Define Success habits and factors
- Create a Not to do list
- Create an Action Priority Matrix
- Determine what you need to release in your life
- Intentionally create your relationships
- Discover a confidence boost through role models
- Create a daily gratitude practice
- Discover what it takes to BE the person who can achieve your goals

Throughout the process, you'll develop an unshakeable belief in who you are and what you can achieve.

Ready? Let's go!



*Joan Jakel*





## INSTRUCTIONS

# *How to use the Goals Workbook*

The Goal Setting and Getting Workbook gives you the place and space to explore and connect with yourself and your goals in a meaningful way.

The following pages provide guidance, activities and worksheets to help you define your goals and create a road map for success.

I recommend you use a specific journal or notebook or dedicated electronic document just for this project. This allows you to track your goals and progress over the course of the year. It will not only keep you on track, it's incredibly rewarding to see your progress and celebrate your accomplishments.

Before you begin, create an environment to encourage curiosity and support your goal exploration. Set intentions for what you want to accomplish as you work through the Workbook. Give yourself permission to focus on YOU and what you want to intentionally create in your life.

Expect the best from the process and enjoy the journey.





# GOAL SUCCESS FACTORS



Let's look at some success factors related to goals:

**Written:** People who write down their goals are 20% more successful in accomplishing them than those who either don't write them down or just think about them. There is power in making the goal tangible by the physical act of putting it in writing.

**Review, Review, Review!** People who write down their goals and review them regularly are among the highest achievers. Decide to create a new habit to review your goals daily, weekly, monthly and quarterly to stay on track, make any modifications and accelerate your progress.

**Support:** People who set goals and report their progress to accountability partners achieve 40% more than those who do not have a support system. Find an accountability partner and enjoy goal planning, implementing and celebrating together. Not to mention you'll have twice as much fun in the process! Similarly, it may be time to put up boundaries to prevent unsupportive people from raining on your parade.

**SMART:** Create Specific, Measurable, Achievable, Relevant and Timely goals that set you up for success in the very structure of the goal. I'll teach you how to create SMART goals in the following worksheets.

**Alignment:** Keep your thoughts, beliefs, words and actions aligned with achieving your goals. An empowered mindset and belief system build confidence to do whatever it takes grow while achieving your goals.

**Visualization:** Visualize the successful outcome by seeing yourself achieving your goals.



# OWN YOUR WORTHINESS



The bedrock of birthing your goals starts with believing you are worthy of them and they are worthy of you!

I need you to listen closely and receive what I'm about to share:

**You are worthy. Period.**

You were born worthy and there is NOTHING you need to do to earn worthiness. Over our lifetime, we've been conditioned to believe we are flawed and we have to perform in some other-defined, deserving way to earn our way to worthiness. This is simply not true.

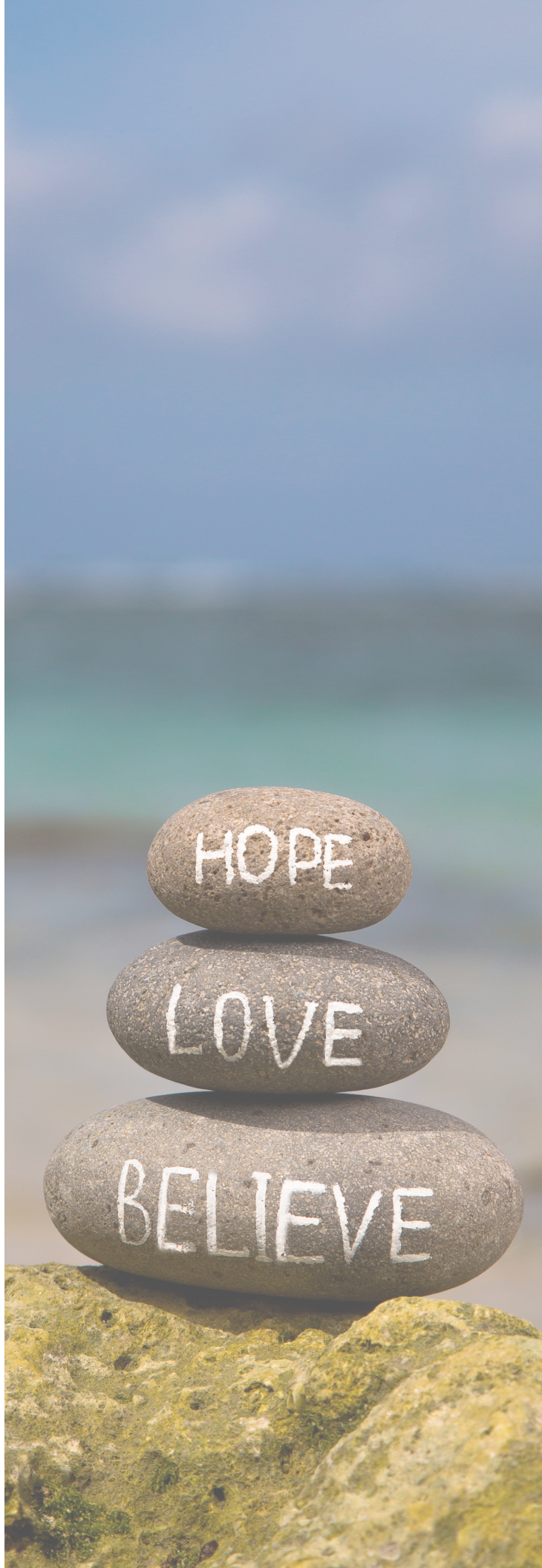
Inherent worthiness is not obtained through merit. You are not flawed - our conditioning is flawed. You are a divine being, born worthy, filled with skills, gifts and talents to serve your goals and vision.

Part of our important life work is to peel back the layers built up by family, teachers, environment, social media, society, that tell us we're not good enough or have to accomplish a certain metric to earn our worthiness. *Perhaps* well-intended messaging, but distorted to generate false beliefs and hide the truth.

It's time to return to your innate state of worthiness to design your life with intention.

Make it a daily practice to DECLARE and BELIEVE:

**I am Worthy!**







# EMBODY & EMBRACE SUCCESS



Another key to successfully achieve your goals is the ability to embody and embrace the characteristics of a person who has already accomplished your goals.

**Walk, talk, think, feel, believe and act as a person who has already achieved your desired goals.**

Keep your mind, beliefs, words and actions aligned with successfully achieving your goals.

Speak of your successful outcome before it arrives.

Take daily inspired actions aligned with achieving your goal.

**EXPECT** to be successful – there is no room for doubt in this process.

Believe in your ability and understand the “why” driving your goals so completely that success is inevitable.

If something unexpected arises, pivot and change to navigate it and maintain forward progress.

If the unexpected tempts you to think you failed, I challenge you to re-frame “failure” as “new information” to guide you to the next course of action. Then, fail forward with zero judgment and unparalleled excitement to try a new approach.



# UPGRADE YOUR BELIEFS



One of your roles as a powerful creator of your life is to remove any limiting belief that tells you that you cannot achieve your goals. You must believe in your goals with complete conviction before you can achieve them.

If you don't truly believe, you will be defeated before you start. If necessary, make adjustments to your goals so they stretch you AND you believe you can achieve them.

**The success formula looks like this:**

- start by BELIEVING you can achieve your goal,
- eliminate ANY negative belief that tells you otherwise
- replace the negative belief with a new supportive belief to start creating an empowered mindset, and then
- take daily aligned inspired action to solidify the shift.

Closely monitor your mind for any limiting beliefs or negative stories that try to prevent you from pursuing your goal or that tell you that you can't have it or achieve it.

When a limiting belief shows up, examine it, get curious and look for its origin. It tends to come from old, untrue conditioning.

**Choose to release the limitation and replace it with an empowered belief that aligns with your truth.** A belief that assures you that you have exactly what it takes to achieve your goal, you are worthy of it and it's yours to create.

Make it a daily practice to dismantle limiting beliefs and build better beliefs, all aligned with your truth and values.

Create mantras and affirmations, think healthy, empowered thoughts and play them on repeat every single day.

You are the only person who is responsible for what you allow in your mind. Make it a top priority to cultivate a mindset and belief system that fully support you in every way, every day.





# CELEBRATE YOUR RESULTS

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## **Remember to celebrate the victories!**

If you steadfastly work through all the worksheets and apply what you learn with commitment and daily discipline, it's only a matter of time before you will celebrate achieving your goals. However, celebration is not reserved for the end.

Celebrating our victories, large and small, throughout the process is an important part of the process. It's an honoring of YOU, your skills, gifts and talents, and your commitment to use them to create something new in the world.



When we honor who we are, how we are and what we are, we honor the deepest part of ourselves and we usher in more opportunities to create and celebrate. We grow as human beings and expand our impact in meaningful ways.

When you show up, own your worthiness, declare your goals, expand your belief system to be unstoppable in their pursuit, take the inspired action that lights you up and ultimately put your gifts into the world - you make the world a better place.

## **Now that's worth celebrating!**





# GOAL PLANNING WORKSHEETS

# Extraordinary Goal Setting Questions

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## EXTRAORDINARY Goals are:

- a) **Outcome focused:** Once you understand your WHY behind your goal, you're 90% there!
- b) **Align with your values:** The more a goal aligns with your values, the EASIER and more fulfilling it is to achieve. You can achieve goals that don't align with your values but it's harder to do and less satisfying.
- c) **State in the positive:** i.e. "I show up 10 minutes early for meetings." **rather than** "I want to stop being late for meetings."

## Extraordinary Goals are most effective when they are SMART:

- **Specific**—so you know *exactly* what you are achieving
- **Measurable**—so you'll know *when* you've achieved it!
- **Actionable** (by you)—so *you* are in control and can get it done
- **Realistic**—so it is achievable
- **Time-Bound**—it has a deadline

## Focus on the Outcome

1. What is it that you really, REALLY want? Why? *Dig deep...*
2. What is the SPECIFIC outcome you desire?
3. What is the PAIN for you of NOT achieving your goal?

## Align with your Values

4. Does this goal align with your life/business vision? *Do you need additional information?*
5. Does this goal align with your values? *If not, how can you modify it to align?*
6. Are your goals something YOU truly want, or are they something you think you SHOULD have or SHOULD be doing? *Tip: If it's a SHOULD, change it to something you really WANT to achieve.*
7. When you think about your goal, does it give you a sense of deep contentment, joy, happiness and/or excitement? *If not, modify it until you feel pulled into the desire of achieving it.*
8. If you could have this goal RIGHT NOW, would you take it? *If not, why not? What change is needed?*
9. How does this goal fit into your life/lifestyle? *Time/effort/commitments/who else might be impacted?*

## Identify the Obstacles

10. Can you start, and maintain, the action and energy necessary to achieve this goal?
11. How will pursuing this goal affect other aspects of your life? *i.e. What might you need to change, add, discontinue or deal with in order to achieve this goal?*
12. What's good about your CURRENT situation? *i.e. What's the benefit of staying right where you are?*  
Then ask, how can I keep those good aspects while STILL making changes to go after my goal?
13. WHAT might you have to give up/stop doing to achieve this goal? *Essentially, what's the price of making this change and are you willing to pay it?*
14. If there was something important around achieving this goal (to help you succeed or that could get in the way) that you haven't mentioned yet, what would it be?
15. WHO will you have to BE to achieve this goal? HOW will you show up to achieve it?

## Consider Goal Sizing

16. Is your goal the right size? *Too big? Break down into smaller goals. Too small or uninspiring? Turn it into a larger or stretch goal.*
17. What would be the MINIMUM/Super-Easy level of goal to achieve? } give yourself a goal
18. What would be your TARGET level of goal to achieve? } range to set up
19. What would be your EXTRAORDINARY level of goal to achieve? } your success!

## Resources: Get Moving

20. What RESOURCES do you already have to help you achieve your goal? Make a list! Such as *support from people, contacts, personal qualities, knowledge, skills, money, time, technology, etc.*
21. What RESOURCES do you NEED to help you achieve your goal? Make a list!



# Creating SMART Goals

SMART Goals set you up for success. When your goals are clear and you know exactly what you're working towards, it's easier to get started, make action plans, see your progress and ultimately succeed!

**INSTRUCTIONS:** Follow the steps below to learn about SMART goals then begin to develop a goal of your own and identify 3 actions to get started toward your goal.

What do you want to set a goal around? \_\_\_\_\_



**SPECIFIC, SIMPLE, SENSORY** *The more specific, simple and clear you are, the easier your goal is to start, work towards & achieve. Also, get Sensory. Ask yourself: What is the specific outcome/result I desire? What will I see, hear, feel, smell, taste when I get it? Write your goal below and make it Specific, Simple & Sensory:*

\_\_\_\_\_



**MEASURABLE & MEANINGFUL** *A measure lets you track your progress and know when you've achieved your goal. It could be a number, percentage or some other measure. Also, make your goal Meaningful to you so you have a desire to achieve it.*

**Rewrite your goal to add a MEASURE to know when it's complete and why it matters:**

\_\_\_\_\_



**ACTIONABLE** *goals are within your control. This means YOU can make it happen, even if you need help. i.e., "winning the lottery" is not 'Actionable' as it's out of your control.*

**Write out 3 Key Action steps you can take to work toward your goal:**

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_



**REALISTIC** *Great goals challenge, inspire and you need to believe you can achieve them. What's reasonable given your commitments, resources and timeframe?*

**Rewrite your goal, ensuring it is inspiring and REALISTIC:**

\_\_\_\_\_



**TIME-BOUND** *goals motivate to complete them by a deadline. Is there a specific date your goal will be accomplished? If not, select one. Consider your lifestyle, responsibilities and resources, then set a realistic deadline.*

**What date will you complete your goal?**

**By** \_\_\_\_\_

# Creating SMART Goals

## SMART Goal EXAMPLE:



**Starting goal:** Sell more eBooks.

- **Specific** - Double the sales of my health eBook.
- **Measurable** - Increase the revenue from my health eBook from \$10,000 to \$50,000.
- Is it **Actionable** and within your control? **3 Key Steps I can take include:**
  1. Create a new, more engaging cover
  2. Create a marketing action plan i.e., Ask 25 friends to read and review it on Amazon.
  3. Increase the price from \$9.95 to \$12.95.
- **Realistic** - Increase the revenue from my health eBook from \$10,000 to \$25,000.
- **Time-Bound** - I will complete this goal by: November 30, 2024.

**Final goal:** Increase the revenue of my health eBook from \$10,000 to \$25,000 by November 30, 2024.

## Before writing the final version of your SMART Goal, here's a final tip:

**Great goals are stated in the POSITIVE.** Why? What we focus on expands and our mind doesn't process a negative. If you say "I want to stop biting my fingernails," your brain doesn't register "Stop" and builds a picture of biting your fingernails and maintains a focus on it. Instead, create a picture of what you DO want and are working towards. Here are two examples:

- Use "I have healthy, strong fingernails" rather than "I want to stop biting my nails."
- Use "I weigh 150 pounds." rather than "I want to lose 20 pounds."

**Write your finished SMART Goal below after** applying all of the above information.

**My SMART Goal is:** \_\_\_\_\_

\_\_\_\_\_ by \_\_\_\_\_ Day - Month - Year

## Outline the first 3 Steps towards your SMART Goal below:

Action 1 \_\_\_\_\_ by when \_\_\_\_\_

Action 2 \_\_\_\_\_ by when \_\_\_\_\_

Action 3 \_\_\_\_\_ by when \_\_\_\_\_

***Redefine and adjust as needed.***

*Sometimes our goals change or the way we're approaching them no longer feels in alignment. Make sure that you take the time to regularly review them and redefine or adjust as needed.*



# Personal Goal Setting

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It can be challenging to **FIND** the time to reflect on what we want in life so it's important to **MAKE** planning a priority. Why? To ensure we're intentionally designing and pursuing a life with meaning and purpose.

If we don't know what we want in life, we end up going wherever life takes us, which is a recipe for uncertainty, lack of fulfillment and often exhaustion.

When we clearly know what we want and what we're working towards, it's easy to say "YES!" to what's in alignment and, perhaps more importantly, to say "No" to what's out of alignment.

**Goals give us a sense of purpose.** They also serve as a driver. When we *know* what we want, we can consistently ask ourselves, "Does this action/thought move me closer to, or away from, my goals?"

## INSTRUCTIONS

- 1) Create some spaciousness in your calendar.
- 2) Set up your environment to support you in honest reflection and turn off any potential disruptions.
- 3) Set an intention for what you want to experience and then answer the questions below.

## Part 1 - Brainstorm Ideas

The purpose of this exercise is to brainstorm potential goals.

- i. For each of the 2 lists below, brain dump all big or small ideas that resonate with you. Don't limit yourself.
- ii. Then CIRCLE 5 of your ideas (from either list) as possible goals. Generally, these are the first 5 things that grab, inspire or excite you.

1. List below everything you want to **BE, DO and HAVE** in the next year:

2. List below everything you **DO NOT WANT** to **BE, DO and HAVE** in the next year:

# Personal Goal Setting

## Part 2 - Refine your Ideas

Working towards unexciting goals is hard, unmotivating and will lead to doubtful results. Let's check your 5 potential goals against why you want them and how exciting (score at least a 7) they are before you go any further.

Write the Top 5 ideas for potential goals:  Select or create 5 ideas from Part 1 that you would love to work on in the year ahead.	What would achieving this goal do for you?  How will your life be different? Does it bring you more of what you want in life? Why do you want it?	How EXCITING is this goal?  Score it from 1 (yuck) to 10 (!!)
1.		_____ / 10
2.		_____ / 10
3.		_____ / 10
4.		_____ / 10
5.		_____ / 10

## Part 3 - Set Your Goals!

Now it's time to pick 3 goals. The best goals are:

- a) **Aligned with your values.** The more a goal aligns with your core values the easier and more rewarding it will be to achieve.
- b) **Stated in the positive.** What we focus on expands so state what you WANT i.e. "I want healthy fingernails" rather than what you don't want: "I want to stop biting my nails."
- c) **Specific!** The more specific your goals are, the easier it is to keep steering in the right direction.

Write below the 3 Main GOALS: Review your worksheet and choose 3 meaningful goals you want to bring to life	WHY? WHY do you want this goal? What are the benefits to you? What's your motivation?	WHEN will you achieve it? This is a date to inspire you & keep you on track to achieve it.	HOW will you know you've achieved your goal? What's the final step? What will you see when it's done?
1.		Month      Year _____ / 2025	
2.		Month      Year _____ / 2025	
3.		Month      Year _____ / 2025	



# Personal Goal Setting

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## Part 4 - Prepare for Success

### Success Accelerators:

What can you start or stop doing, do more or less of that will help you achieve your goals?

### Smash those Obstacles:

What could get in the way? If you were going to sabotage yourself, how would you do it?

### Motivating Advice:

What is the best advice you could give yourself to make sure you achieve these goals?

## Part 5 - Take Action

### Choose ONE thing you will do for EACH goal this month

Decide one action you'll complete toward EACH goal and the date by which you will complete it. This is your FIRST STEP. Break the action down into a smaller step or action until you can commit 100%. Then, start to create an action plan for additional steps and timeframes to ultimately achieve your goals.

GOAL 1 Action \_\_\_\_\_ by \_\_\_\_\_

GOAL 2 Action \_\_\_\_\_ by \_\_\_\_\_

GOAL 3 Action \_\_\_\_\_ by \_\_\_\_\_

And finally, what ONE action will you start tomorrow? \_\_\_\_\_

## Part 6 - Support and Commitment

### WHO will help & support you? Who can mentor you? Who can help you be accountable?

Examples: A personal trainer, a coach, a friend, family, a work colleague. Get specific as to how they can support you.

1. Who \_\_\_\_\_ HOW Specifically? \_\_\_\_\_

2. Who \_\_\_\_\_ HOW Specifically? \_\_\_\_\_

3. Who \_\_\_\_\_ HOW Specifically? \_\_\_\_\_

Who will you have to BE to achieve these goals? \_\_\_\_\_

☐ I am committed to achieving my goals Signed \_\_\_\_\_

***Congratulations! Just one more step.***

*To really commit to your goals, complete the Goal Summary Sheet on the next page.*

# Personal Goal Setting

## Part 7 - Take Off!

Here is a summary sheet to complete and fully commit to your goals. Simply pull your answers from the relevant sections of this worksheet.



Personal Goal Setting SUMMARY SHEET	
<b>2025 Goals</b>	My <b>CHEERLEADERS</b> are: <i>See part 6 of this worksheet</i> 1. _____ 2. _____ 3. _____
My <b>TOP 3 Annual Goals</b> are: <i>See part 3 of this worksheet</i> 1. I _____ by _____ 2. I _____ by _____ 3. I _____ by _____	
The <b>BENEFITS to me</b> of my goals are: <i>See part 3 of this worksheet under WHY?</i> 1. _____ 2. _____ 3. _____	My <b>KEY Action Steps</b> are: <i>See part 5 of this worksheet</i> 1. _____ _____ 2. _____ _____ 3. _____ _____
<b>My Biggest Success ACCELERATORS:</b> <i>See part 4 of this worksheet</i> 1. _____ 2. _____ 3. _____	<b>Signed:</b> _____ <b>Date:</b> _____
<div><i>Life's most profound moments reside in daring choices. Joan Jakel</i></div>	For resources, tools & help to achieve your goals, visit <a href="http://www.JoanJakel.com">www.JoanJakel.com</a>

### STAY ON TRACK

Now you have completed the Summary Sheet, cut it out and put it somewhere you will see it regularly like your fridge or bathroom mirror.



# Business Goal Setting

Business Name \_\_\_\_\_ Today's Date \_\_\_\_\_

## Part 1: Set the Stage

My Theme for this Year is \_\_\_\_\_

**Where do you want your Business to be in \_\_\_\_ years?** Imagine it's \_\_\_\_ years from now. What's your vision? Be audacious & inspired. Think possibilities, not probabilities. Take a moment to visualize it & get sensory: What does your business look & feel like? What do you hear & see?

**What do you WANT for your business, but don't yet have?** i.e. income, type or number of clients, location, equipment, employees, etc.

**What do you HAVE in your business, but don't want?** i.e. anything that gets in the way of your goals or adds stress/costs without reward.

**What's most important to you in the next year? My Top 3 Business Priorities are:**

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

**Brainstorm some ideas.** Make 2 lists below and identify as many items as you can think of from big to small. When you're done, circle items from either list that grab, inspire or excite you as possible goals.

1. List everything you **WANT to BE, DO and HAVE** in your business in the next year.

2. List everything you **DO NOT WANT to BE, DO and HAVE** in the next year:

# Business Goal Setting

## Part 2: Set your Top 3 Business Goals

### Choose 3 Primary Business Goals

If you did nothing else, what 3 goals would make this coming year a business success? What would you be disappointed if you didn't achieve? Complete all the columns below and be as specific as possible.

Write out your Top 3 Business Goals below:	Why bother? Why THIS goal? What outcomes are you looking for? What are the <i>benefits</i> to you or your business?	When will you achieve it? Pick a date that inspires but does not drain you.	How will you know you've achieved this goal? How can you measure it or prove it's completed?
1.		___ / ___ / 2025	
2.		___ / ___ / 2025	
3.		___ / ___ / 2025	

### Choose 7 Secondary Goals

These goals are a secondary focus of your business. They may be small things that have been 'niggling' you for some time. They may be stepping stones to long-term goals or they may be large goals all by themselves.

1. These goals can be distinct from yet further the above 3 primary goals.
2. State each goal in one concise sentence and when you will achieve it.

Write out 7 Secondary Business Goals below:	When will you achieve it?
1. _____	___ / ___ / 2025
2. _____	___ / ___ / 2025
3. _____	___ / ___ / 2025
4. _____	___ / ___ / 2025
5. _____	___ / ___ / 2025
6. _____	___ / ___ / 2025
7. _____	___ / ___ / 2025



# Business Goal Setting

## Part 3: Prepare for Success

### Success Accelerators

What can you start or stop doing, do more or less of, that will help you be successful?

### Smash those Obstacles

What could get in the way? If you were going to sabotage yourself, how would you do it?

**Advice:** What's the best advice you could give yourself to ensure you achieve these goals?

## Part 4: Take Action

**Choose ONE action item you'll take on your Top 3 Goals.** Decide one action—the first step—you'll complete for each of your top 3 goals and add a deadline. If necessary, break the action down into a smaller step or action until it feels achievable and you can commit 100%.

**GOAL 1 Action** \_\_\_\_\_ by \_\_\_\_\_

**GOAL 2 Action** \_\_\_\_\_ by \_\_\_\_\_

**GOAL 3 Action** \_\_\_\_\_ by \_\_\_\_\_

And finally, what ONE action will you start tomorrow? \_\_\_\_\_

## Part 5: Support and Commitment

**WHO will help and support you? What key support do you need?** For example, your coach, mentor, business partner, friend or colleague. Get specific as to how they can support you.

1. **Who** \_\_\_\_\_ **HOW Specifically?** \_\_\_\_\_

2. **Who** \_\_\_\_\_ **HOW Specifically?** \_\_\_\_\_

3. **Who** \_\_\_\_\_ **HOW Specifically?** \_\_\_\_\_

**Who do you have to BE to achieve these goals?** \_\_\_\_\_

☐ **I am committed to achieving my goals**    **Signed** \_\_\_\_\_

***Congratulations! Just one more step.***

*To really commit to your goals, complete the Goal Summary Sheet on the next page.*

# Business Goal Setting

## Part 6: Take Off!

This summary sheet will help you commit one step further to your goals. Simply copy your answers from the relevant parts of this worksheet.



Business Goal Setting SUMMARY	
<b>2025</b>	My <b>SUPPORTERS</b> are: <i>See part 5 of worksheet</i> 1. _____ 2. _____ 3. _____
My <b>TOP 3 Goals</b> are: <i>See part 2 of this worksheet</i> 1. _____ by _____ 2. _____ by _____ 3. _____ by _____	
The <b>Top BENEFITS</b> of my goals are: <i>See part 2 of this worksheet</i> 1. _____ 2. _____ 3. _____	My <b>KEY Action Steps</b> are <i>See part 4 of this worksheet</i> 1. _____ _____ by _____ 2. _____ _____ by _____ 3. _____ _____ by _____ <b>Signed:</b> _____ <b>Date:</b> _____
<b>My Biggest Success ACCELERATORS</b> <i>See part 3 of this worksheet</i> 1. _____ 2. _____ 3. _____	
<i>In the realm of possibility, risk is the bridge to extraordinary. Joan Jakel</i>	For resources, tools & help to achieve your goals, visit <a href="http://www.JoanJakel.com">www.JoanJakel.com</a>

### STAY ON TRACK

Now you've completed the Summary Sheet, cut it out and put it somewhere you will see it regularly like near your computer.

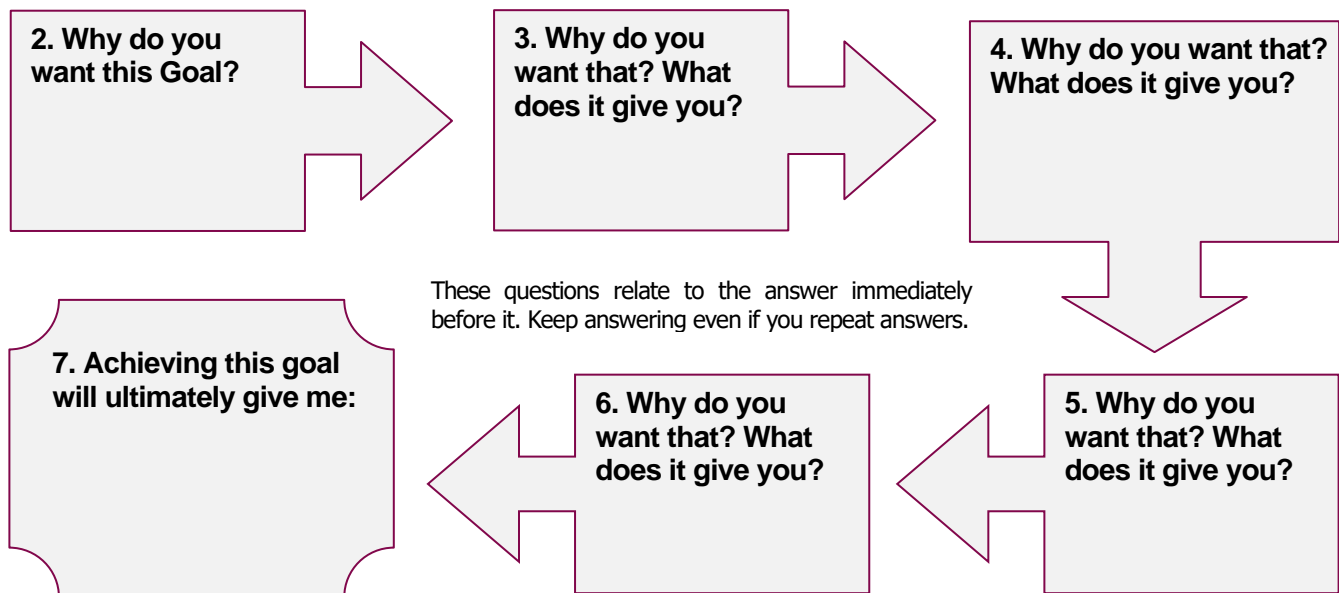
# Goals Motivator – Discover your “Why”

Why we want our goals is totally unique to each person. A pay raise may mean self-esteem and validation, or it could mean security, a holiday or getting married. Once we understand the WHY behind our goals, it's easier to focus and find motivation to achieve our goals.

To get the most out of this exercise, be *totally honest* with yourself. Write down whatever pops into your head without any judgment or hesitation. If an answer is slow to reveal itself, feel your way into it. It can be emotional discovering and connecting with your why.

**Write Your Goal Here:** \_\_\_\_\_

**1. First, score 1 (low) – 10 (high), how motivated are you right now to achieve this goal:** \_\_\_\_ / 10



Now you understand why this goal is important to you. Let's increase the motivation by understanding why you want this goal **NOW**.

**8. What circumstances in your life make this goal important to you right now? Why is this the ideal time?**

Now you understand your true motivation, does this change the way you feel about your goal?

**9. I am now motivated to achieve this goal:** \_\_\_\_ / 10

(If your motivation score is not 7 or above, consider modifying it to up the motivation!)

**10. What did you learn about yourself and your goal? How will it impact your goal?** \_\_\_\_\_



# Goal Success Factors

Write your SMART Goal here \_\_\_\_\_

See the next page for a reminder of SMART goals to help you create a successful goal.

by \_\_\_\_\_ Day - Month - Year

MOTIVATION	
WHY do I want this goal. These are the outcomes I want:	
List ALL the Benefits I will receive by achieving the goal:	
The BIGGEST Benefit of achieving my goal is:	
What is the PAIN of not achieving this goal?	
Achieving this goal will ALSO help me in these other areas:	
OBSTACLES (also known as your 'secondary gain')	
Is there a BENEFIT to me of NOT completing my goal?	
Other obstacles to my success could include:	
SET GOAL LEVELS i.e. your goal achievement level or measure could vary on time, quantity, quality	
MINIMUM	
TARGET	
EXTRAORDINARY	
TO ACHIEVE THIS GOAL, HOW WILL YOU OR YOUR BUSINESS NEED TO BE DIFFERENT?	
In order to achieve this goal I will START doing:	
In order to achieve this goal I will STOP doing:	
In order to achieve this goal I need to BE someone who is:	
RESOURCES TO CONSIDER i.e. equipment, people/skills, information, technology, knowledge, finance etc.	
Resources already available include:	
Resources I will need are:	
TAKE ACTION (make these actions EASILY achievable so you get moving and feel good about moving forward)	
3 steps I will complete in the next WEEK that move me closer to my goals include:	1. 2. 3.
3 steps I can complete in the next MONTH that move me closer to my goals are:	1. by 2. by 3. by

## Goal Success Factors

### SMART GOALS are:

1) **Stated in the POSITIVE.** We get what we focus on, so focus on the positive of what you desire rather than the negative of what you want to eliminate.

EXAMPLES of goals stated in the positive:

- *I hire a new, experienced sales manager* (rather than *I have to fire the sales manager*).
- *I show up 10 minutes early for meetings* (rather than *I want to stop being late for meetings*).

### 2) Use the Acronym "SMART"

- **Specific.** Be specific so you know *exactly* what you want to achieve and how to achieve it.
- **Measurable.** Include a measure so you know when you've achieved it and can track progress.
- **Actionable.** This ensures *you* have direct control over the actions needed to achieve the goal. Is this goal within your control? For example: *Winning the lottery* is not 'actionable'.
- **Realistic.** Goals need to be both motivating AND realistic so you can achieve them.
- **Time-Bound.** Your goals need a realistic deadline.

**FOR MAXIMUM SUCCESS,  
ENVISION ACHIEVING  
YOUR GOAL as fully as  
you can.**

**Fully describe a day in  
your life, or the life of  
your business, when this  
goal is achieved.**

How did you accomplish it?  
What can you see around you?  
What do you hear? What do  
you see? What are people  
saying? How do you feel  
(emotionally and physically)?  
Where are you? Who is around  
you? Who did you become in  
the process?

What is your business like  
now? How does it feel to walk  
into the workplace? How is  
your business operating  
differently? What else do you  
notice?

***FINALLY, remember that goals are meant to inspire, empower and motivate you.  
Adjust as necessary if circumstances change.***

# Goals for the Year

**INSTRUCTIONS:** Refer to your *Goal Setting* worksheet and write out your Annual Goals below to create a Year-at-a-Glance Summary Sheet.

Top 10 Goals Annual Focus _____	How Important	Complete	Key Goal Benefits
1.	_____ / 10	Y / N	
2.	_____ / 10	Y / N	
3.	_____ / 10	Y / N	
4.	_____ / 10	Y / N	
5.	_____ / 10	Y / N	
6.	_____ / 10	Y / N	
7.	_____ / 10	Y / N	
8.	_____ / 10	Y / N	
9.	_____ / 10	Y / N	
10.	_____ / 10	Y / N	



## Goals for Quarter \_\_\_\_\_

**INSTRUCTIONS:** Refer to your *Goals for the Year*. Then identify 7 Quarterly Goals and complete the worksheet below.

Top 7 Quarterly Goals Quarterly Focus _____	How Important	Complete	3 KEY ACTIONS To Kick off the Goals
1.	_____ / 10	Y / N	
2.	_____ / 10	Y / N	
3.	_____ / 10	Y / N	
4.	_____ / 10	Y / N	
5.	_____ / 10	Y / N	
6.	_____ / 10	Y / N	
7.	_____ / 10	Y / N	

# Monthly Action Tracker

Month \_\_\_\_\_ Year \_\_\_\_\_ This Month's Focus \_\_\_\_\_

## INSTRUCTIONS

Complete the entire row for each action. If your action will take longer than 4 hours, consider breaking it down into smaller action items or multiple steps for ease of delegation & support.

Share with appropriate members of your team for collaboration, support, delegation & accountability.

Monthly Actions		How Important (10 is high)	Approx. Time this action will take	Due Date	Delegate to/Support	Complete
Be sure to make these actions SMART: Specific, Measurable, Actionable, Realistic and Timebound.					Who will do this? What support is needed to get this task done?	
1.		___ /10				<input type="checkbox"/>
2.		___ /10				<input type="checkbox"/>
3.		___ /10				<input type="checkbox"/>
4.		___ /10				<input type="checkbox"/>
5.		___ /10				<input type="checkbox"/>
6.		___ /10				<input type="checkbox"/>
7.		___ /10				<input type="checkbox"/>
8.		___ /10				<input type="checkbox"/>
9.		___ /10				<input type="checkbox"/>
10.		___ /10				<input type="checkbox"/>

# Monthly Action Tracker

Monthly Actions		How Important (10 is high)	Approx. Time this action will take	Due Date	Delegate to/Support	Complete
Be sure to make these actions SMART: Specific, Measurable, Actionable, Realistic and Timebound.					Who will do this? What support is needed to get this task done?	
11.		___/10				<input type="checkbox"/>
12.		___/10				<input type="checkbox"/>
13.		___/10				<input type="checkbox"/>
14.		___/10				<input type="checkbox"/>
15.		___/10				<input type="checkbox"/>
16.		___/10				<input type="checkbox"/>
17.		___/10				<input type="checkbox"/>
18.		___/10				<input type="checkbox"/>
19.		___/10				<input type="checkbox"/>
20.		___/10				<input type="checkbox"/>



**NOTES:**



# Weekly Success Planner

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## My Week in Review

week ending \_\_\_\_\_

Be sure you complete the questions below in full. You can add *more* items you're proud of, but not fewer. If you have trouble finding answers, think smaller, or lower your standards until you can.

### Progress this week?

What specifically have I achieved or moved forward? What are my successes and wins?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### What am I proud of this week?

What am I acknowledging that I did well this week? Personally or professionally, big or small.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### What have I learned this week?

When was I too hard on myself? What could I have done differently? What did I learn/key insights I discovered?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Appreciation

What am I grateful for this week, big or small? What went better than expected? What pleasant surprises did I have?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### The 3 people I will make a point of thanking this week are:

\_\_\_\_\_

**What one thing could I do differently next week?** Review everything above and identify one thing I could do differently next week. It could be an action, a thought or quote I focus on. It could be an attitude, how I choose to see the world or something else. Write it here and see what happens next week:

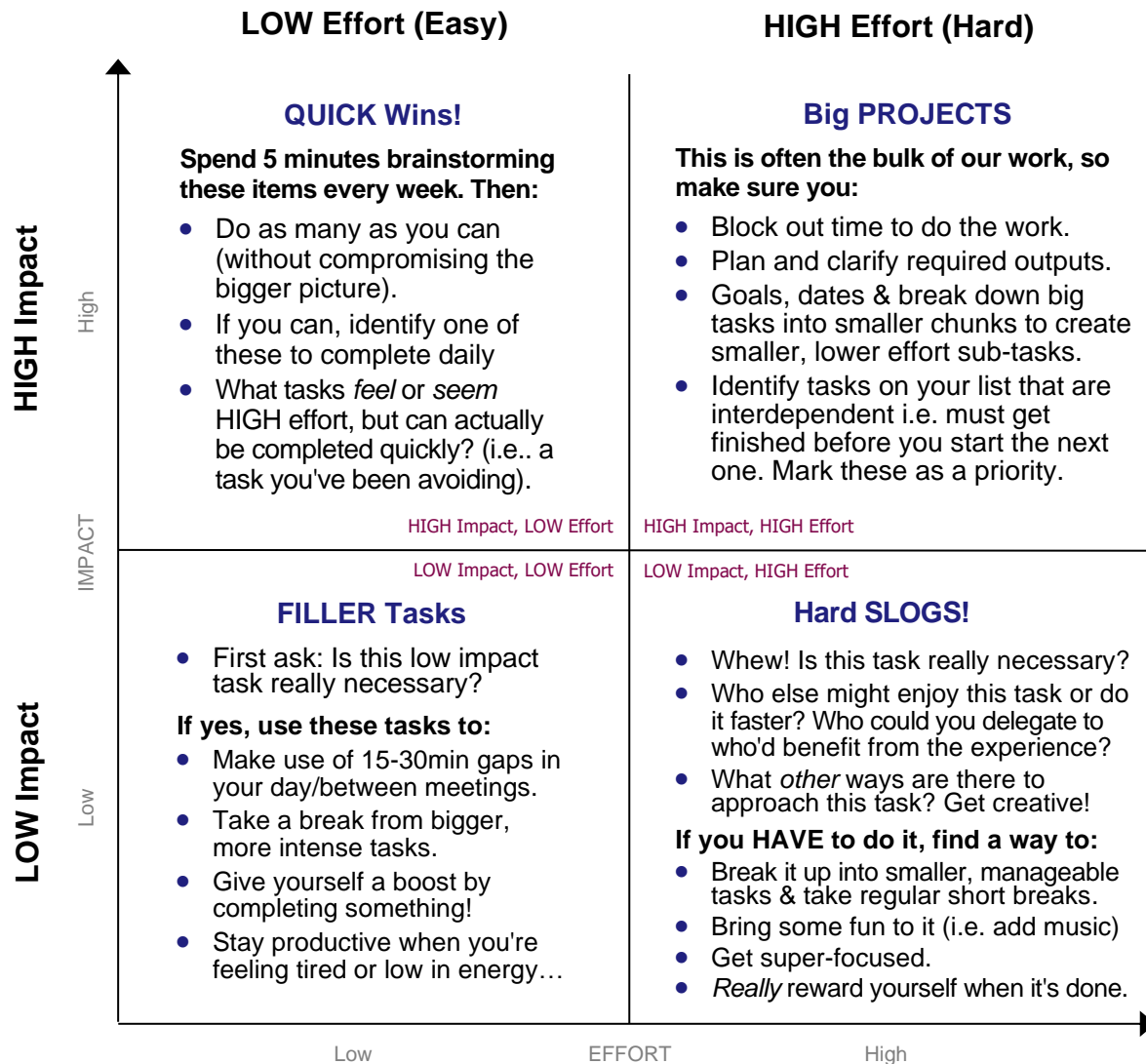
\_\_\_\_\_



# The Action/Priority Matrix – Productivity Exercise

**BACKGROUND:** Would you like to be more productive with the time you have? Achieve more with less effort? Delegate time-consuming tasks? Well, let's do it! ! Achieve more by identifying **QUICK Win Tasks** that are LOW Effort yet HIGH Impact and letting go of **Hard SLOGS**: HIGH Effort, LOW Impact tasks.

But first, you must identify them. Review the quadrants below and then use the template on page 2 to assess your task list, boost your productivity and enjoyment factor while getting results!



What have you learned so far – a few a'ha moments? \_\_\_\_\_

\_\_\_\_\_

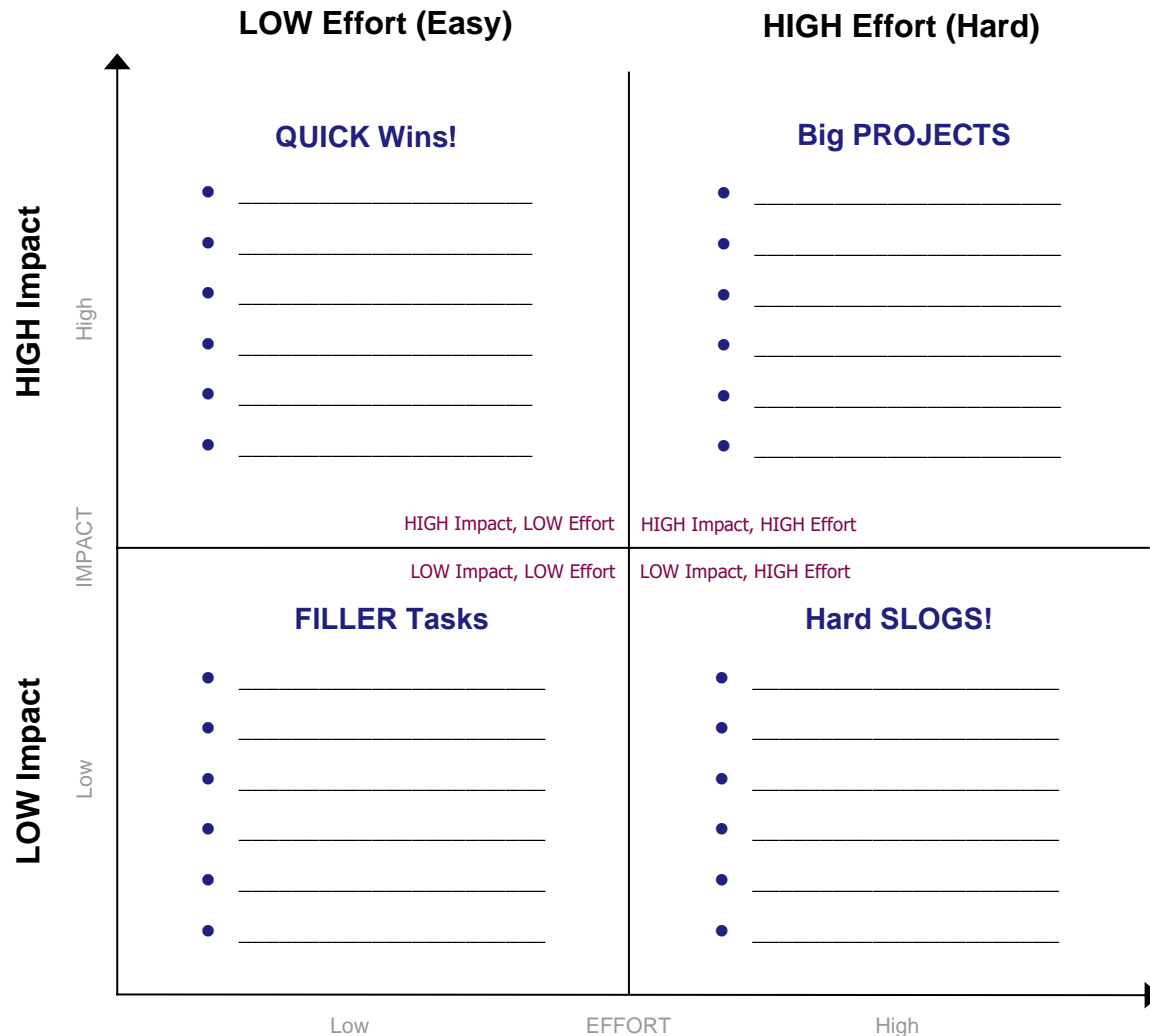
\_\_\_\_\_

*Now it's time to put YOUR tasks into the relevant categories on the chart below, so you can make use of this productivity technique.*

# The Action/Priority Matrix – Productivity Exercise

**INSTRUCTIONS:** Many of us spend most of our time on big project tasks. But what quick wins could you focus on or let go of hard slogs that would maximize your productivity? Use the template below to review your task-list and see where you can slot the items on your list.

1. Start to pay attention to where you spend most of your time: write down what % of time you spend in each quadrant.
2. Review your tasks for the week and then assign them to the quadrants below.
3. Highlight any deadlines you absolutely **MUST** get done this week. Which quadrant are they in?



**BE MORE PRODUCTIVE:** How would you like to spend your time differently? Consider what actions you could take in the next week to improve your productivity. How can you maximize your *Quick Wins* while also completing your *Big Projects*? What gaps do you have where you could complete necessary *Filler Tasks*? What *Hard Slogs* could you delegate or drop altogether?

The Quick Wins I will focus on are \_\_\_\_\_

The Hard Slogs I will delegate or drop are \_\_\_\_\_

Other Action/s I will take are \_\_\_\_\_

Why not put your completed chart somewhere obvious so you can refer to it & update as the week progresses?

# Weekly & Daily To-Do List

## Weekly Action Planner

**INSTRUCTIONS:** Review your Quarterly/Monthly Goals and Action/Priority Matrix to identify your Weekly Actions, Quick Wins, Filler Tasks & Delegation. Then identify your Daily Actions on page 2. **Don't overschedule yourself.**

**SMART Actions** are Specific, Measurable, Actionable (by you), Realistic, Time-bound (they have a deadline).

### 1) Key SMART Weekly Actions

*Your Top 3-5 actions that move you towards your goals—in priority order. These actions should be completed this week. If not break them down into smaller chunks.*

☐ 1. \_\_\_\_\_

☐ 2. \_\_\_\_\_

☐ 3. \_\_\_\_\_

☐ 4. \_\_\_\_\_

☐ 5. \_\_\_\_\_

### Future Actions

*Note top priorities and actions that come up for next week:*

- 
- 
- 

### Other Notes

### 2) Quick Wins

*Small actions with big impact that take a few mins to an hour.*

☐☐☐

### 3) Filler Tasks

*Fill gaps with regular/necessary tasks of 30 minutes or less.*

☐☐☐

### Future Ideas

*Capture your ideas here.*

- 
- 
- 

### 4) Delegate/Get Help

*What do you need or want help with? I will delegate/get help with:*

☐☐☐☐☐

### 5) Personal Tasks

**For you:** Appointments, Pay bills, Self-care actions, Essential chores.

**For others:** Birthdays, Check-ins, Anniversaries, Socials, Gifts/Cards.

☐☐☐☐☐

# Weekly & Daily To-Do List

## Daily Action Planner

**INSTRUCTIONS:** Refer to your Weekly Action Planner on page 1, then use this page to plan out your day ahead. Refer to and update this page throughout the day.

- Don't overdo it! Review your calendar first: What can you achieve given your pre-existing commitments?
- Working daily on one big project action and 1-3 smaller actions is ideal.

**SMART Action reminder:** Specific, Measurable, Actionable (by you), Realistic & Time-bound.

### My Top 3 Actions This Week (in priority order)

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

	Daily Work Priorities: Work FIRST on What Matters MOST		Other Tasks
Monday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Tuesday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Wednesday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Thursday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>
Friday	Key SMART Action/s <input type="checkbox"/>	Quick WINS/FILLER Tasks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Personal/Delegation Tasks <input type="checkbox"/>

Notes \_\_\_\_\_



# The Not To-Do List

This exercise helps you STOP doing things that slow you down or that get in the way of you achieving your goals. You probably already have an idea of things you could stop doing. Use this tool for a one-off 'efficiency boost' or complete it regularly to refocus and refine your time management.

## INSTRUCTIONS

- The goal is to identify things NOT to do! These are usually activities where you distract or sabotage yourself. Ironically, to stop doing something we often need to do something else instead (see final column).
- Keep this exercise with you and fill it out throughout the day OR think about a typical day, starting at the beginning and working forward. Then for each segment (i.e., morning, lunchtime, afternoon, evening) ask yourself, "Where do I distract myself?"
- The more specific you can be the better. Some areas to consider are your email/internet/phone usage, eating and exercise habits and goals you never quite seem to achieve...
- Identify AT LEAST 3 "Distraction" or "Not To-Do" items to focus on to maximize your success.

<b>DISTRACTION</b> Be specific so you're clear on how you distract yourself.	<b>IMPACT</b> Be specific to get the TRUE impact	<b>MY NOT To-Do List.</b> <b>I will STOP:</b>	<b>Instead, I WILL:</b>
<b>Example: Be more focused at work</b> (I keep stopping to check email & get distracted answering them)	<i>I lose focus for about 20 mins EACH time!</i>	<i>Answering each email as it arrives</i>	1) Turn off email pinger 2) Check email at set times, i.e., 9am/12pm & 4pm
<b>Example: Stick to diet</b> (I keep working through to 2pm and I am SO hungry that I need food, fast!)	<i>I go next door for fast food &amp; don't stick to my diet!</i>	1) Working through lunch! 2) Having 'unhealthy' fast food for lunch	1) Either take lunch OR go to health food store 2) Set alarm to stop for lunch
1.			
2.			
3.			
4.			
5.			

Put the completed sheet somewhere obvious (like your fridge or computer) so you can refer to it often.

# Daily Success Habits Tool

## BACKGROUND

- We tend to overlook the importance of *simple daily habits* in managing ourselves and our lives. It's often the *small* changes we make to our routines that make the *big* changes in our lives, businesses & careers.
- This tool helps you build a simple personal framework around which the day's activities fall into place and help you feel calm and confident.

### 1) My Top 3 PRIORITIES in life right now are

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

### 2) My Top 3 STRESSORS in life right now are

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

### 3) What supportive daily habits—SPECIFIC DAILY ACTIONS—could you introduce?

Write up to 5 actions that best support you to minimize your stress and focus on your priorities. Include your home, personal and work life. Create *specific* and *measurable* actions so you know exactly what to do and when you've completed it.

*You know yourself best: Where do you sabotage yourself regularly? What action would better support you? What is your best stress buster? How can you find calm and confidence in your day?*

#### EXAMPLES:

Prioritize 15 minutes of silence or alone time each day  
Drink 8 glasses of water a day  
Be at my desk by 8 am / leave by 6 pm every day  
Eat a healthy breakfast every morning  
Be in bed by 10.30pm  
Do at least 30 mins exercise/activity every day  
Check email max 3 times daily (8 am, 11 am & 4 pm)

Make all my calls in the first hour of the day  
Write my top 3 priorities for the day every morning *before* starting work  
Eat lunch away from my desk  
Take 10 mins after lunch to recap priorities  
Write all appointments down - in one place  
Meditate for 30 minutes every day

#### New Habit

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#### Benefit to me

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### 4) Which 3 habits will you IMMEDIATELY commit to and WHY?

I will start \_\_\_\_\_ because \_\_\_\_\_

I will start \_\_\_\_\_ because \_\_\_\_\_

I will start \_\_\_\_\_ because \_\_\_\_\_

### 5) Who do you need to BE to implement these habits? I am someone who is:

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

# Daily Gratitude Journal

Today is \_\_\_\_\_

How was my day? The score for my day as I start this entry is \_\_\_\_\_

This is your *initial gut-feel* score from 1 (terrible) -10 (OUTSTANDING!) that represents how you felt your day went.

## My Progress & Successes Today

List 3 successes or items on which you made progress today.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Pat Yourself on the Back

What did you do today that required courage? What positive choice did you make consistent with who you want to become? What are you celebrating?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**What have you learned?** What did you learn about yourself today?

\_\_\_\_\_

**Goals & Intentions:** What steps did you take today towards your goals or priorities?

\_\_\_\_\_

**What, if anything, triggered you today? How did you handle it?**

\_\_\_\_\_

**Where do you need to be kind to yourself?** If you had been kinder to yourself, how would it have made a difference?

\_\_\_\_\_

**Looking after You!** What did you do today just for YOU?

\_\_\_\_\_

## Gratitude & Appreciation

List 3 things you are grateful for (or appreciated) today. Keep them fresh every day

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

The score I now give my day as I complete this journal is \_\_\_\_\_

What is the difference in my scores from start to finish (if any)? \_\_\_\_\_

(This is your score from 1 – 10 that represents how your day went now that you have reviewed your day with a more positive mindset)

**What do I notice?** Make a note here of what you've learned and anything else you may want to record like what you noticed as you reflected, things you may want to do differently tomorrow, etc.

\_\_\_\_\_

# Intentionally Create Your Relationships

**BACKGROUND:** We are the average of the people with whom we surround ourselves. Success experts say that *who* we spend our time with is a key influence on our happiness, outlook on life and level of success. Experience shows us that empowered, successful people spend most of their time with other people who are successful, have an empowered mindset and a great outlook on life.

This exercise will help you identify those people who empower and support you and those who pull you down. It will help you make honest choices about the people who belong in your life and create boundaries or remove those who don't.

## INSTRUCTIONS

1. Make a list of up to 15 people you spend most of your time with. Then put a + or - next to each one:
  - + **if you feel good about yourself** after spending time with them. You enjoy your time with them and they support and encourage you. These are often people you *look forward* to spending time with.
  - if after spending time with them, **you somehow feel 'less.'** You may feel smaller, less happy or have less energy or worry unnecessarily before, or after, seeing them. You likely already have an idea who these people are.
2. Next, add a (gut-feeling) score from -5 to +5 for each person to identify HOW much of a positive or negative effect they have on you.
3. Finally, identify an action, such as cultivate a deeper relationship, spend more time, less time, no time with them.

Name	+/- Score	Action
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____
7. _____	_____	_____
8. _____	_____	_____
9. _____	_____	_____
10. _____	_____	_____
11. _____	_____	_____
12. _____	_____	_____
13. _____	_____	_____
14. _____	_____	_____
15. _____	_____	_____



# What Do I Need to Release? Letting Go Exercise

**INSTRUCTIONS:** Is it time to let go of something that's holding you back? This exercise helps you identify what you are holding onto that is serving as an anchor to your past and keeping you from moving forward. Read the below story and the questions and suggestions that follow. Then, make a list: What are you holding onto that it's time to release? What drains you or slows you down? What riles you up? What is getting in the way of you being the best version of yourself?

**A STORY:** Two Buddhist monks return to their monastery after the rains. They reach a swollen river and in front of them is a woman in a delicate silk kimono, distressed because she is unable to cross the river by herself. The older monk scoops her up, carries her safely to the other side. The two monks continue on their way in silence. Later, as the monks reach their destination, the younger monk (who has fumed for the last 5 hours) finally bursts out, "How could you? We're not allowed to touch a woman!" The older monk, surprised, replies, "I put her down 5 hours ago, why are you still carrying her with you?"

As with the younger monk in the story, the things we hold onto (i.e. feelings of anger, hurt, guilt, resentment, blame, shame, etc.) cloud our mind, hold us back and stop us from meaningfully engaging life. The irony is that whatever you're holding onto that is related to another person is probably not even on their radar, just as in the monk story.

Letting go usually involves some form of forgiveness or acceptance of yourself, someone else, a situation or even an unknown third party.

Letting go doesn't mean we condone a situation or behavior; rather it's about putting down a burden that's unnecessarily weighing us down. When we let go of the anchor, we find a deeper acceptance of ourselves along with the opportunity to reclaim freedom and enjoy life again.

While you can't change the past, you can learn from it and change how you feel and respond to it going forward.

**Practical pointer:** The hardest item to release is where you'll find the most freedom in releasing.

Holding grudges or hanging onto resentments doesn't change the facts or modify past behavior or lead to a resolution – they only serve as a prison to the person holding them. Take any action there is to take, have a conversation, make an apology, set a new boundary and if there is no action to take, simply decide to let it go. Release it with gratitude for the lesson learned.

**Final Thought:** You are the only one responsible for your life. Make an empowered choice to release anything holding you back and give yourself the gift of freedom.

**What am I choosing to release?**

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**How I benefit by letting go?**

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## What Do I Need to Release? Letting Go Exercise

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Just for a second, imagine letting go of *everything* on this list. How does it feel? \_\_\_\_\_

What have I learned about myself while doing this exercise? \_\_\_\_\_

# Role Model Confidence Boost

## INSTRUCTIONS

- We often have role models or people we admire. It could be their image, energy, resilience, communication skills, leadership skills, the way they make life seem so easy and uncomplicated, how they make you feel, etc.
- Whatever inspires you, think about *who* you'd like to be by considering the qualities in others that you admire & aspire to.
- Allow yourself 20 minutes of quiet time to relax and write your answers below.

1. **Who are your Top 3 Role Models?** Who impresses you? Who do you admire and respect?

*They can be real or from your imagination, someone you know, or don't, from a film or book, dead or alive.*

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

2. **Who has been most influential** in your life, personally and professionally?

**Personally** \_\_\_\_\_ **Professionally** \_\_\_\_\_

3. **How have they impacted you?** What do you most admire about them and why? What can you learn from them?

4. **Which of these qualities would you like to emulate in an authentic way?**

IMPORTANT: What you see in others, you already have within you (or you wouldn't be able to recognize it)

5. **How could you begin to bring some of these qualities into your everyday life?**

*How could you adapt what your role models do to fit you and your life? What unique slant could you add?*

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. **Finally, what one specific action** will you take to move forward?

I will \_\_\_\_\_ by when \_\_\_\_\_

**Final thought:** Reading books, memoirs, biographies or watching/listening to podcasts, movies and documentaries about the people you admire can give you ideas and inspiration on how to add skills and confidence to your life.

# Be The Person Who Achieves the Goal

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Creating SMART goals and action items to support them is the masculine side of goal planning. In order to keep you in balance and uber successful, we want to incorporate the feminine approach to goal setting and goal getting. The feminine side incorporates who you are “being” and how you are showing up to achieve your goals.

As excited as I know you are to take action and jump into doing whatever it takes to set your goals in motion, I invite you to start by “being” before “doing.” Let me explain why.

There is a common misconception that for us to HAVE something we want in life, we have to DO whatever it takes to achieve it and through the process, we then BECOME the person who knows how to get it. While this process can work, there’s a better, faster way that’s more aligned with achieving your goal. In fact, it’s the exact reverse of the above model.

**The secret sauce to accelerate achieving your goals is to begin by stepping into the identity of someone who has already achieved your goals.** Your top priority is to BE the person who knows how to achieve the goal. Step into the persona of the person who knows exactly what to do to successfully achieve your goals and then – do it! Take action on those items.

**BE** the person who knows how to achieve the goals,  
**DO** the things that this person would do to achieve the goals, and then  
**HAVE** the outcome you desire, achieve your goals and celebrate your success!

**This model puts you in the driver’s seat.**

The key to your success is determining who you have to “BE” to accomplish your goals and then BE that person.

You can start by asking: “Who is a person who has achieved the result I desire? What are their thoughts? Imagine the supportive mindset they live into every day. What are their beliefs? What do they tell themselves every day? What are their habits? What actions do they take? How do they show up in life and who are they in the process? Emulate these behaviors **in an authentic way** as you breathe life into, and give form to, your dreams and goals.

**End result:** When you BE the person who knows how to achieve the goal and then DO the things they know to do to achieve the goal, you end up HAVING what you desire, your goal.

**Let’s try it on for size:**

What is your goal, vision or desire?



## Be The Person Who Achieves the Goal

---

Who is the person who already has achieved that goal or desire?  
(If you don't know a person, imagine the type of person who could or has achieved it.)

### CHARACTERISTICS, BELIEFS AND VALUES

What are their qualities and characteristics? How does this allow them to show up in all areas of their life and business?

What type of beliefs does this person have?

What do they value in life and business?

How do they view and perceive themselves?

How do they perceive what could be “failures” and reframe them?

## Be The Person Who Achieves the Goal

---

What are their predominant thoughts?

What do they choose to focus on?

How do these compare to your current beliefs, values and characteristics? Is there a gap?

### CAPABILITIES

What skills/knowledge/education/training does this person have?

What skills/knowledge/education/training do you possess that this person has?

What skills/knowledge/education/training do you need to learn?

## Be The Person Who Achieves the Goal

---

How will you use these skills and knowledge to achieve your goals?

### BEHAVIORS

What habits does this person have? Why are they important?

What habits could you upgrade, create, or release to achieve your goals?

If something doesn't go according to "plan" how does this person react and move forward?

What are their predominant feelings? How confident are they in their abilities? What do they do when a negative feeling, doubt or fear lands on them?

## Be The Person Who Achieves the Goal

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What actions do they take? What do they do on a regular basis? What and how do they prioritize? What do they NOT do?

### ENVIRONMENT

What does this person's work environment look and feel like? How does it support them?

What improvements to your environment would be more supportive?

Who does this person choose to spend their time with? What are/aren't they available for? Do you need any changes in your relationships?

## Be The Person Who Achieves the Goal

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How does your life align with a successful role model of someone who has accomplished your current goal? Do you see any notable differences? What are the most impactful shifts you can make to align with the attributes of someone who can and will achieve your goal?



**Now, go BE that person and DO those actions to HAVE the outcome you desire!**



# FINAL REFLECTIONS



You made it through the entire Workbook!

## **Congratulations!**

How did you show up every day?  
Who did you become in the process?  
What did you learn about yourself?  
Did you accomplish your goals?  
How did you celebrate?

I'd love to celebrate you so send me an email and share your victories!

If you are interested in deepening the practices I've shared with you, learn new tools, develop new skills, take on your life at a whole new level with the accountability of a coach, I'd love to show you the way. I've provided resources you can click on below and I've shared ways you can work with me. I'd love to have a conversation and explore the possibilities.

Carpe Diem!

*Joan Iakel*

# Helpful Resources

Click the number to access the resource

01

## **The Key Ingredient to Achieving Your Goals & 4 Steps to Implement**

Learn how to use your conscious mind to set goals, your subconscious mind to get the goals and instantly train your brain to find the solution and outcome to simplify the process.

02

## **4 Steps to Finally Achieve Your Goals**

Learn how to shift your inner dialogue to start creating more supportive thoughts to build better beliefs to not only accomplish your goals – to design a more fulfilling life.

03

## **5 Tips to Develop Resiliency**

Learn how to masterfully take on life's challenges, create a BadAss Inventory to identify your amazing characteristics, successes, accomplishments, uniqueness & superpowers, and design an Empowerment Kit to nourish, empower, delight and support.

04

## **The Importance of Serving Your Dream**

Learn why your dreams matter, how to prioritize them and enjoy some colorful, creative guidance to take daily inspired action to breathe life into them.





# MEET JOAN

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**Empowerment Instigator**

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**Click icons below to connect  
and for more information** 📌

Hi there! I'm Joan.

I'm an Empowerment Instigator – equal parts mindset & personal development coach, entrepreneur, (retired) business attorney and creative maverick

If you are ready to thrive and develop an unshakeable belief in who you are and what you can achieve, I've packaged a lifetime of lessons, wisdom and business savvy into coaching programs that catalyze action and instigate results.

If I'm describing you and you're feeling a nudge to check it out, give me a call or shoot me an email and let's have a conversation!



@JOANJAKEL



AMAZON AUTHOR



JOANJAKEL.COM

# Joan Jakel Coaching Programs

Click the number to access more program information

01

## Life Direction Assessment

This program starts with a comprehensive assessment to help you closely examine and explore your life and vision. It's followed up with an in-depth consultation to chart your course on a more meaningful, authentically driven path.

02

## Jump Start Coaching Program

The Jump Start Coaching Program is an entry level coaching program that begins with the Life Direction Assessment and is followed up with coaching to facilitate laser focus on your life to drive immediate action aligned with your goals.

03

## Emerge Coaching Program

The Emerge Coaching Program is a 3-month foundational program. You will receive coaching to assess your life, get crystal clear on your vision, develop an unshakeable belief in your ability to achieve it, create a roadmap bring it to life and take aligned inspired actions leading to results.

04

## Expand Coaching Program

The Expand Coaching Program is a 6-month program. You will **Connect** with yourself at the deepest level; **Learn** how to be the ultimate driver of your vision and **Live** into it every day; **Transform** every obstacle and challenge into an opportunity and **Develop** the unstoppable mindset of a warrior while accessing your inner wisdom to handle anything life throws at you with ease, peace and confidence.