

# SUCCESS+

## ANNUAL GOAL-SETTING GUIDE

**Front-Load Next Year's Accomplishments**





**The end of the year is prime time to look at the year ahead and decide what goals to go after, both personally and professionally.**

**We've designed a way for you to plan and track your important life and career goals for 2025 and beyond.**

# REFLECT

*Look Back,  
Launch Forward*



## Personal Goals

What were your personal goals for 2024 (health, relationships, hobbies, etc.)?

Did you achieve them? If not, why not?

What obstacles did you face?

What strategies worked well?

# REFLECT

*Look Back,  
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## Professional Goals

What were your career goals for 2024 (promotions, new skills, job search, etc.)?

What progress did you make toward achieving these goals?

What challenges did you encounter in your professional life?

What accomplishments did you experience?

# REFLECT

*Look Back,  
Launch Forward*



## Lessons Learned

What key lessons did you learn about goal setting and achievement?

How did your approach to goal setting evolve throughout the year?

What different strategies will you implement next year?

What new skills or knowledge did you acquire to help you reach your goals?



**Identify and prioritize your core values that provide a foundation for your personal and professional life.**

## Brainstorm

**Personal Values:** Think about the qualities you admire in yourself and others. Also consider what principles guide your decisions and actions.

**Professional Values:** Ponder the values that are important to you in your work life. What kind of work environment do you thrive in?

## List Your Values

Choose 10 values that are important to you. Here are some examples to get you started. Add to the list and put a check mark next to those that resonate most:

- |   |                                |
|---|--------------------------------|
| <input type="checkbox"/> Honesty            | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Integrity          | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Compassion         | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Creativity         | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Family             | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Financial security | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Spirituality       | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____              | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____              | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____              | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____              | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____              | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____              | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____              | <input type="checkbox"/> _____ |

## Prioritize Your Values

From the values chosen above, rank them from 1 to 10, with 1 being the most important. Consider how these values align with your long-term goals and aspirations.

- |     |       |
|-----|-------|
| 1.  | _____ |
| 2.  | _____ |
| 3.  | _____ |
| 4.  | _____ |
| 5.  | _____ |
| 6.  | _____ |
| 7.  | _____ |
| 8.  | _____ |
| 9.  | _____ |
| 10. | _____ |



## Analyze and Connect

### Get Personal

- How do your values shape your daily life?
- Are you living in alignment with your values?
- What can you do to incorporate your values into your life consistently?

### Keep It Professional

- How do your values influence your career choices?
- Are your current job/workplace aligned with your values?
- What steps can you take to find a more fulfilling and values-driven career?

### Why Set Goals?

*Setting goals helps to...*

- Increase focus
- Boost motivation
- Improve self-discipline
- Enhance self-esteem
- Reduce stress

## Dream Big

### Personal

- **Health and Wellness:** What steps will you take to improve your physical and mental health?
- **Relationships:** How will you nurture your relationships with loved ones?
- **Personal Growth:** What new skills or hobbies will you learn?
- **Mindfulness and Spirituality:** How will you cultivate inner peace and spiritual growth?

### Professional

- **Career:** What are your career aspirations? What steps will you take to achieve them?
- **Finances:** What are your financial goals? How will you save, invest, or budget?
- **Work-Life Balance:** How will you balance your work and personal life?



## Mastermind SMART Goals

SMART goals are specific, measurable, achievable, relevant, and time-bound objectives that help you focus your efforts, track progress, and increase your chances of accomplishing your goals.

*Example:*

- **Specific:** I want to run a 5K race.
- **Measurable:** I will train three times a week for 30 minutes.
- **Achievable:** I will start with a shorter distance and gradually increase my mileage.
- **Relevant:** Running will improve my physical and mental health.
- **Time-Bound:** I will achieve this goal by the end of the year.

### Personal Goal 1

Specific:

Measurable:

Achievable:

Relevant:

Time-Bound:

### Personal Goal 2

Specific:

Measurable:

Achievable:

Relevant:

Time-Bound:

### Professional Goal 1

Specific:

Measurable:

Achievable:

Relevant:

Time-Bound:

### Professional Goal 2

Specific:

Measurable:

Achievable:

Relevant:

Time-Bound:



## Small Steps, Giant Leaps

For each SMART goal:

- Identify the major steps needed to achieve it.
- Then, assign a specific time frame for each step.
- Finally, determine the order of importance while focusing on completing high-priority tasks first.

### Personal Goal 1

### Personal Goal 2

### Professional Goal 1

### Professional Goal 2



Identify and prioritize your core values that provide a foundation for your personal and professional life.

## Data Tracking and Analysis

**Journaling:** Regularly write about your challenges and achievements.

**Tools:** Use apps like habit, productivity, or fitness trackers.

**Spreadsheets:** Create spreadsheets to track key metrics and data points.

**Identify Patterns and Obstacles:** Look for trends in your data to understand your strengths and weaknesses.

## Weekly Goal Tracker

Use the table below to keep an eye on your progress. Reflect on your weekly efforts and be real with yourself about how well you managed your time each week.

Numerically score your efforts on a scale from 1-10 (best).

Add any additional notes in the Overall Evaluation column.

Week Starting	Personal Goal 1	Personal Goal 2	Professional Goal 1	Professional Goal 2	Time Management	Overall Evaluation

### Self-Correction and Realignment

- Be flexible and willing to adjust your plan as needed.
- Use setbacks as opportunities to learn and grow.
- Ask for feedback from others to get a different perspective.



## Celebrate every milestone reached.

- Treat yourself with small, satisfying rewards like self-care, mini snacks, or quick breaks.
- Give yourself bigger rewards for bigger achievements, like a vacation or a new gadget.

## Share your goals with others for an extra cushion of support

- Find a friend, family member, or colleague who shares your goals and can check in regularly.
- Declare your goals to friends, family, or on social media to help keep you accountable.
- Consider seeking a trained professional for guidance and assistance.



## Say the following mantras to yourself or speak aloud:

*I am capable of achieving my goals.*

*I will take action every day to move closer to my dreams.*

*I embrace challenges as opportunities for growth.*

*I am persistent and will not give up on my goals.*

*I am grateful for my progress.*