



Business@Outside®

DISCOVER YOUR PATH FORWARD

Annual Goal-Setting & Planning Workbook



“DISCOVERING YOUR PATH FORWARD”

must be a continuous practice, seeking to uncover the level of balance, constructive discomfort, and radical self-inquiry necessary to lead an **intentional** life.

By investigating the underlying perceptions of yourself, those around you, the path you are on, and the trails you aim to blaze, you will set upon a journey of knowledge directing you toward your goals.

This workbook, when filled to the best of one’s ability (and level of intentional self-reflection), will provide understanding and alignment toward your goals should save you hours of deliberation, debate, and uncertainty.

Please feel free to share this workbook and the questions herein with your teams, closest relationships, or anyone who you believe would benefit from yearly planning.

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THIS WORKBOOK BELONGS TO:

FOR THE YEAR:

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SECTION ONE

PRIOR YEAR *REFLECTIONS*



VICTORIES AND HIGHLIGHTS

What are your key accomplishments from the the past calendar year that you are proud of / feel good about?

[Four horizontal grey bars for writing accomplishments]

List other highlights and key experiences from this year:

[Four horizontal grey bars for writing other highlights and key experiences]

SHORTFALLS, MISSES, AND LOW POINTS

What were some of the key failures, missed opportunities, or mistakes that you want to acknowledge to yourself?

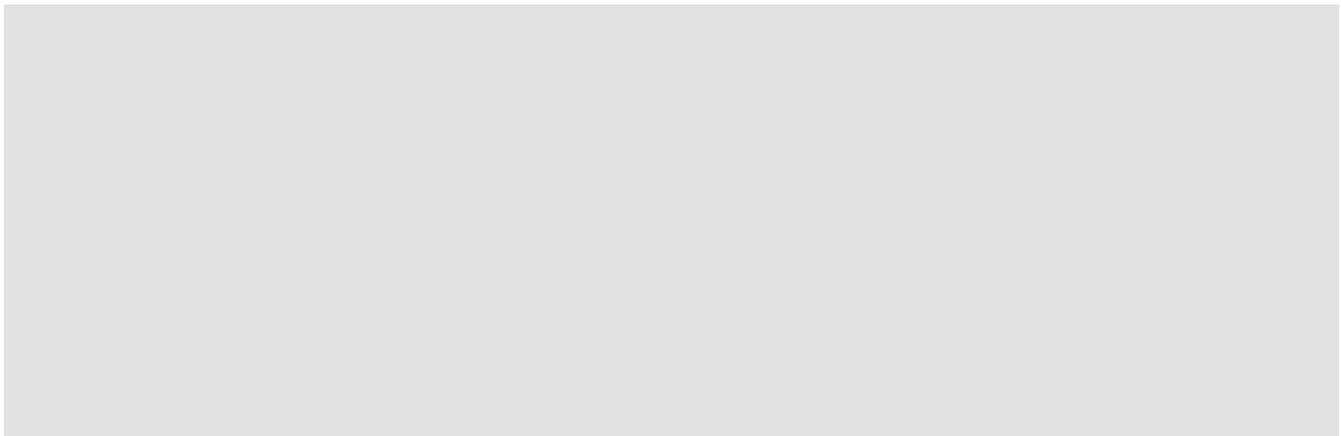
What were some experiences from this past year that caused you distress, turmoil, doubt, and/or pain?

TIME MANAGEMENT

In what four areas was the most rewarding time you spent?

Four horizontal gray bars stacked vertically, intended for the user to write their answers to the question above.

What activities, people, demands, projects, and/or tasks did you spend too much time on during this past year?

A large, empty gray rectangular area intended for the user to write their answers to the question above.

What do you believe is the primary reason that you misuse(d) your time?

What strategies did you employ to better allocate time?



SECTION TWO

YOUR BEST SELF *AND PURPOSE*



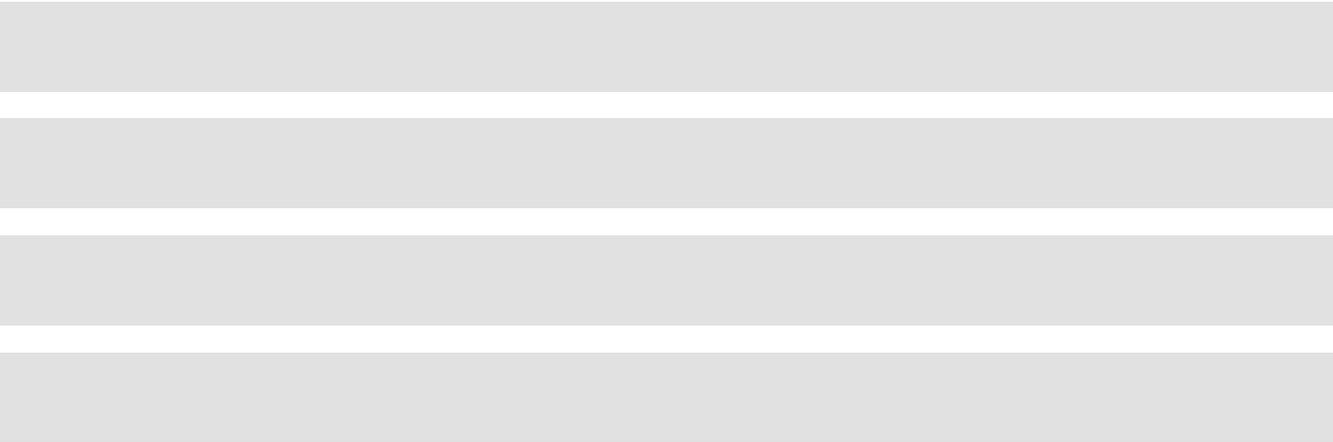
This section is the first step toward improved clarity and depth of purpose. It is intended to help you identify who you are when you are your best and the behaviors that you exhibit when you are at your best.

YOUR BEST SELF VISION

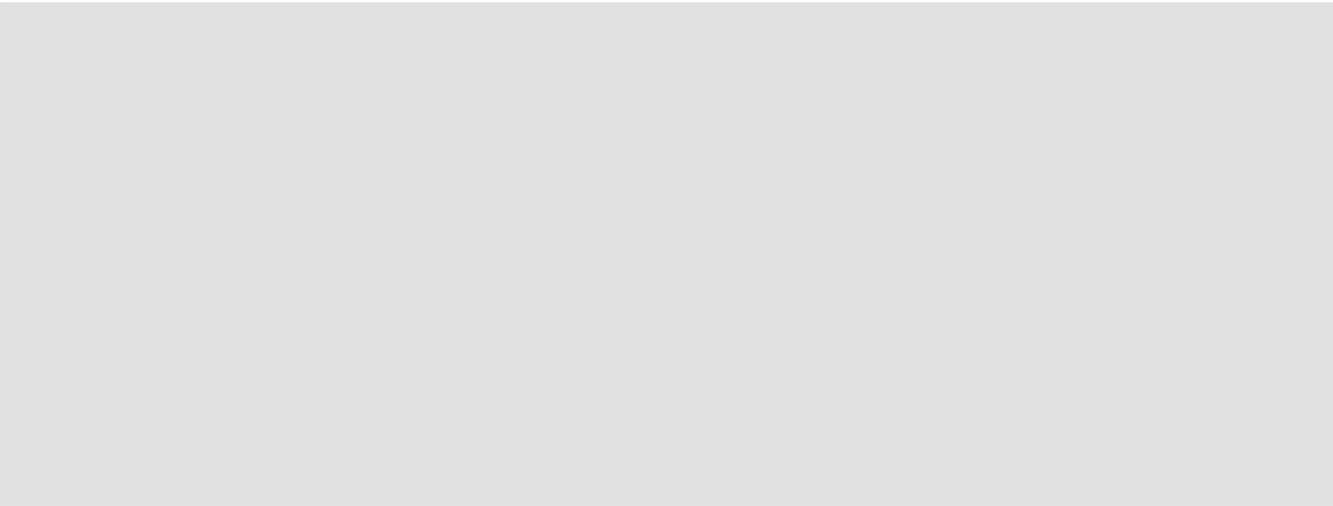
Your “best self” is an important place to start in defining your purpose. Take some time to think about your best self and capture it here. The questions below are intended to help you in this exercise.

Who are you when you are most proud of yourself?

How do you lead, treat others, connect to family, show kindness or compassion, and display your character?

Four horizontal grey bars stacked vertically, intended for writing answers to the question above.

When you are at your very best?

A large, solid grey rectangular area intended for writing answers to the question above.

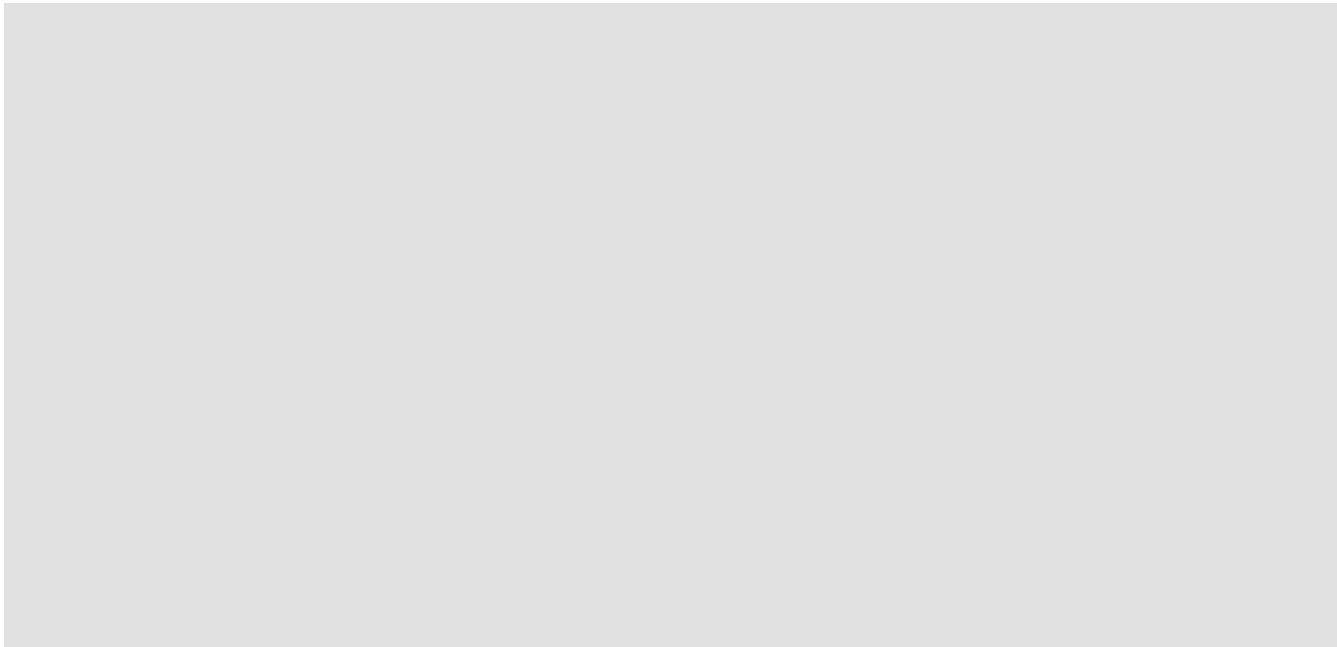
THE TRUTH ABOUT YOUR BEST SELF VISION

What percentage of the time, at work and at home, do you **presently** embody your “Best Self”?

% At Work

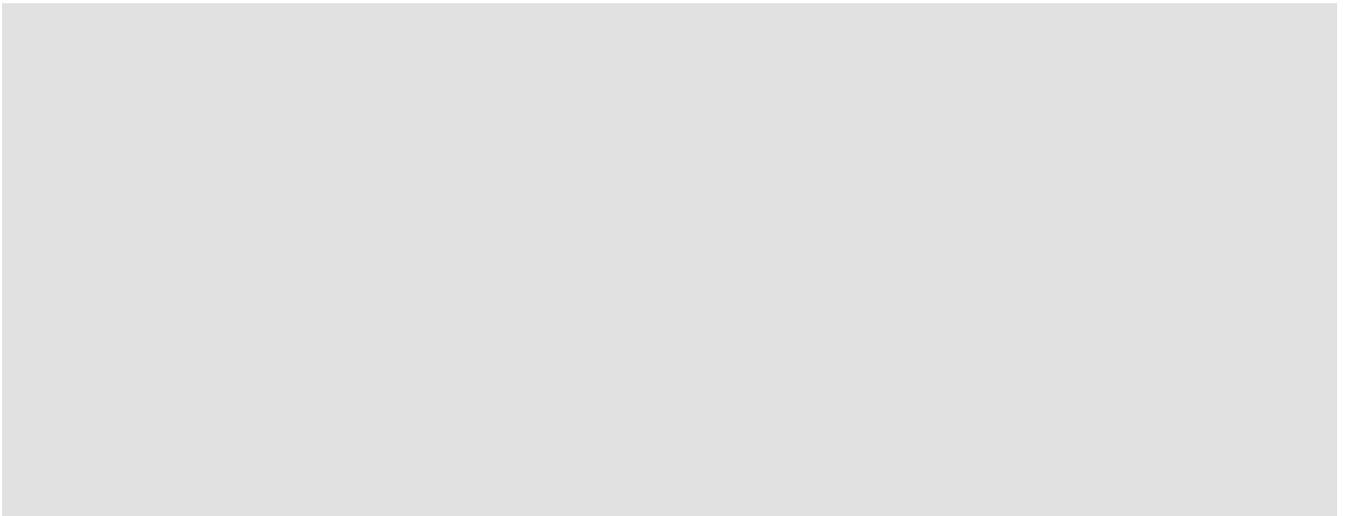
% At Home

When, where, how, and why do you most often fall short of your “Best Self”?



What patterns, efforts, or practices have you recognized in your life that bring you closer to your “Best Self” vision?

How would you want others to describe you?

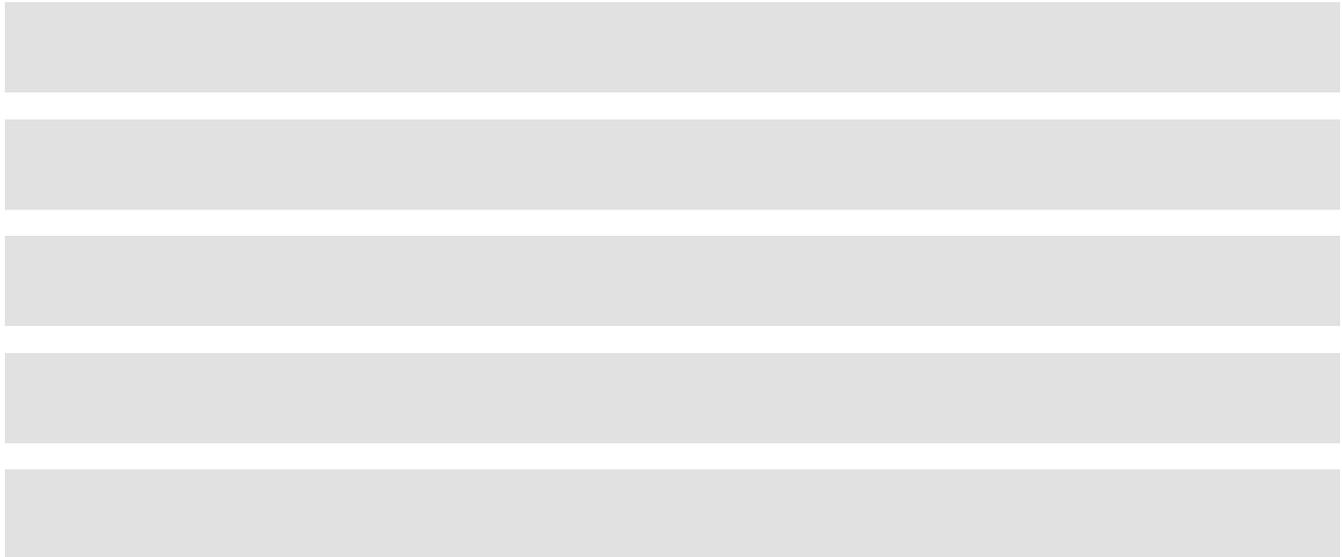


YOUR PURPOSE

An important aspect of performance and wellbeing is understanding who and what matters most in your life – your purpose. Gaining clarity and deepening your connection to your purpose can fuel performance and help you direct your energy toward who and what you care most about in your life. This can create a sense of meaning and fulfillment.

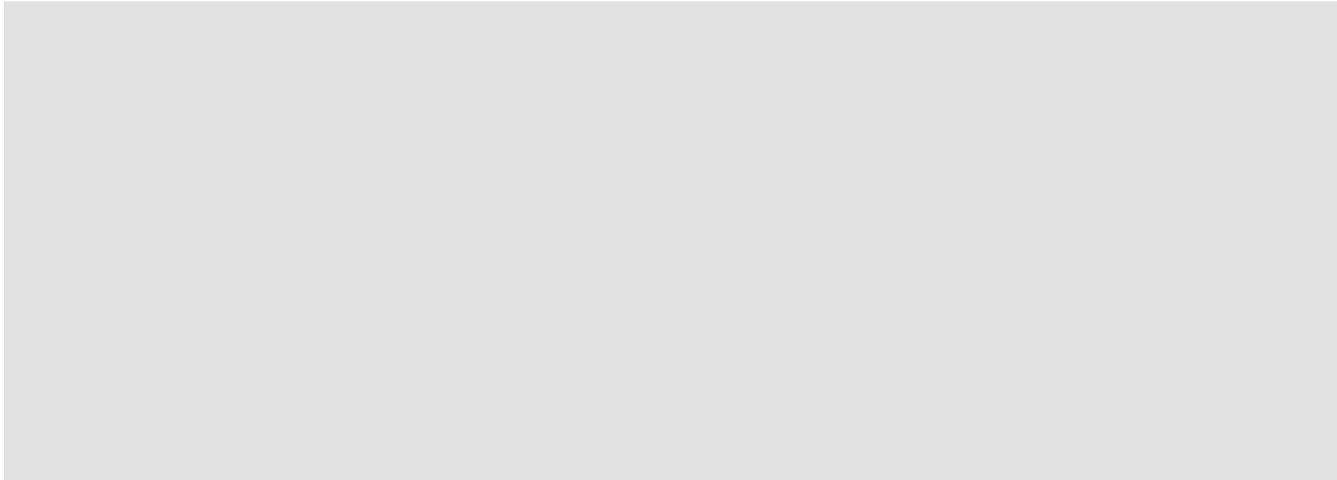
This exercise is intended to help you answer questions around what is most important in your life.

Who / What matters the most to you?

The form consists of five horizontal grey bars stacked vertically, providing space for the user to write their answers to the question above.

How do you define "success" in your life?

What impact do you want to have on others?





SECTION THREE

KEY PRIORITIES *AND CHANGES*



PRIORITY CATEGORIES

In the next twelve months, what priorities (among the below categories) mean the most to you?

EX – FAMILY: SPENDING MORE QUALITY TIME WITH [MY SPOUSE].

Personal:

Three horizontal gray bars stacked vertically, intended for users to list their personal priorities.

Family:

Three horizontal gray bars stacked vertically, intended for users to list their family priorities.

Business:

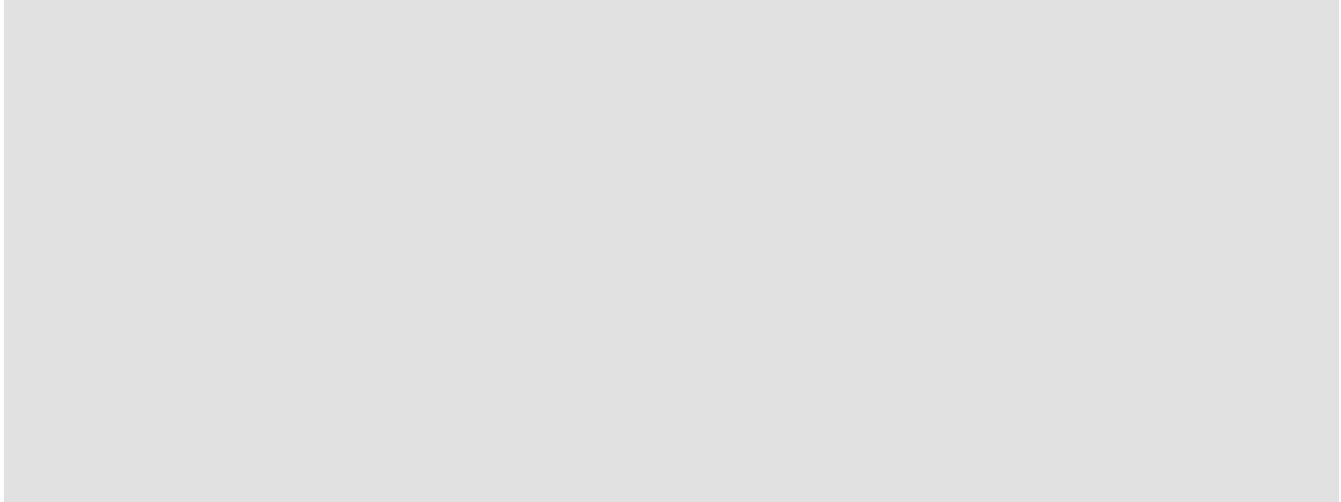
[Redacted content]

Community:

[Redacted content]

BUSINESS / PERSONAL INTEGRATION

My work gets in the way of my personal, family, and community priorities when... because...

A large, empty gray rectangular area intended for the user to write their response to the prompt above.

After reflecting on the above, the three biggest changes you want to make in my life over the next five years are...

A horizontal gray bar intended for the user to write the first of three biggest changes.A horizontal gray bar intended for the user to write the second of three biggest changes.A horizontal gray bar intended for the user to write the third of three biggest changes.

MY TOP PERSONAL VALUES

1) Using the list on the next page, check **all values** based on whether you find them unimportant, somewhat important, or extremely important.

Tip: There is no single definition for any word on the list. You are free to determine your own definition.

2) Draw a circle around what you perceive to be your **six most important** values, and list them below.

Tip: "Bucketing" multiple values under one word often helps narrow the field during difficult decisions.

3) Draw a star next to your **single most important** value.

	NOT IMPORTANT	SLIGHTLY IMPORTANT	REALLY IMPORTANT
TOLERANCE			
OPEN MINDEDNESS			
WORK LIFE BALANCE			
CONSISTENCY			
RESOLVING CONFLICT			
COLLABORATION			
BELONGING			
TRUST			
CONFORMITY			
RESPECTFULNESS			
CHALLENGE			
SELF RESPECT			
ADVENTURE			
CURIOSITY			
FAIRNESS			
PEACE			
MODERATION			
HELPING			
TRADITION			
HEALTH			
SOCIAL RESPONSIBILITY			
LOVE			
PERSONAL GROWTH			
HUMOR			

	NOT IMPORTANT	SLIGHTLY IMPORTANT	REALLY IMPORTANT
LEARNING			
CREATIVITY			
COURAGE			
COMMUNITY			
RELAXATION			
EXCELLENCE			
AMBITION			
INNER HARMONY			
SUSTAINABILITY			
INTEGRITY			
BEAUTY			
COMMUNICATION			
POWER			
TEAMWORK			
SECURITY			
WINNING			
LOYALTY			
SPIRITUALITY			
FAITH			
FORGIVENESS			
CONNECTION			
HAPPINESS			
[ADD YOUR OWN]			
[ADD YOUR OWN]			

ASSESSING MY TOP PERSONAL VALUES

In the past six months, what Personal Value have you leaned into the **most**? How and why?

In the past six months, what Personal Value have you leaned into the **least**? How and why?

What is one meaningful step you can take to **more consistently** lean into your (often) least-prioritized values?



SECTION FOUR

BUSINESS GOALS *AND OBJECTIVES*



NEXT YEAR

What is your single biggest professional challenge this year?

How **difficult** do you believe this goal will be to achieve?

Simple |—————| *Agonizing*

Why?

What is one thing you can accomplish within 90 days to make meaningful progress on this Big Goal for this year?

What are 3 other key (difficult & important) business milestones/goals you fully intend to accomplish this year?

1) _____

2) _____

3) _____

As a whole, how aggressive are these business goals to you?



What lasting change or impact would make you **most proud**, professionally, at the end of the year?

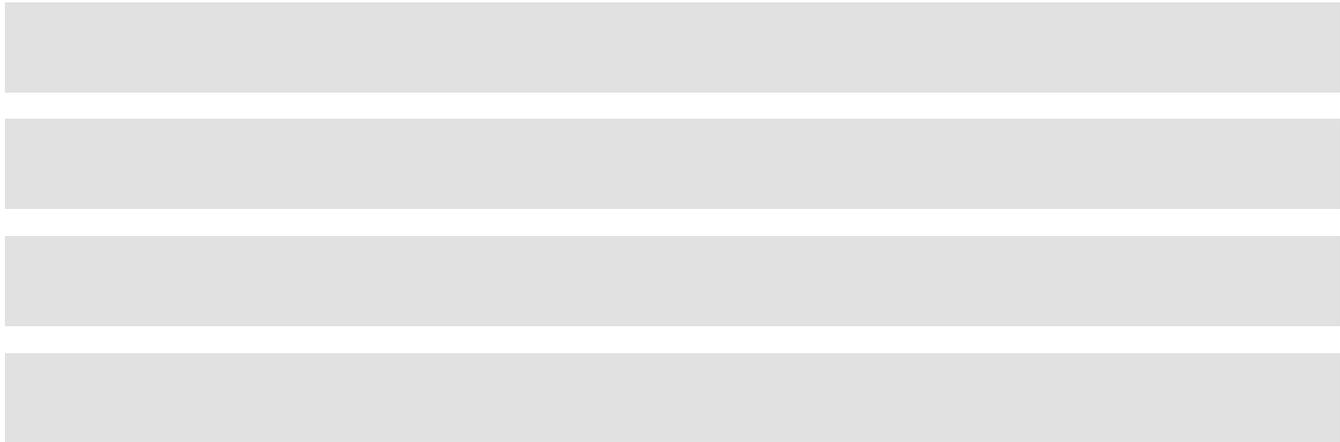
TEAM AND PEOPLE

What leadership positions are currently **open** – or will open soon – that you need to fill this year?

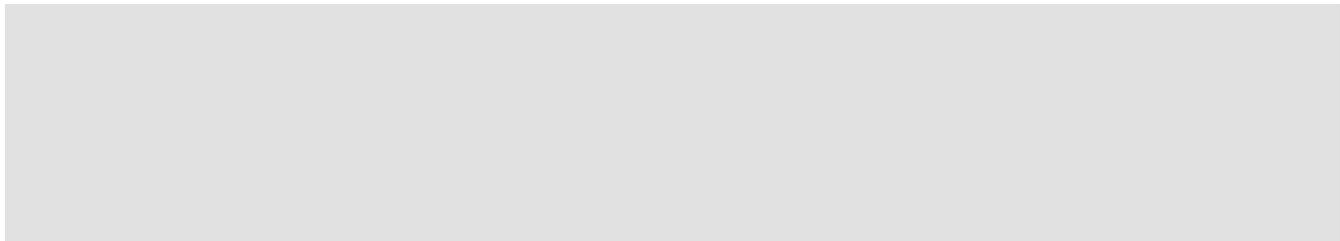
Do you have a B+ player/colleague, who, with some **extra attention**, you could help make an “A”? Or, is there a “B-” player that must improve, or you’ll need to make a change?

What do you imagine reflects “average” categories of your key leadership behavioral **blindspots** or liabilities? (i.e. “doesn’t listen”, “unclear”, “deceptive”, “impatient”, “dismissive”, “demands too much”, etc.)

Be honest with your self as to what you think people feel. Self awareness is a great strength.

Four horizontal grey bars stacked vertically, intended for writing answers to the question above.

Who do you believe **most frequently** and **accurately** identifies your blind spots?

A large, single horizontal grey box intended for writing answers to the question above.

What people on your team (or surrounding you) do you rely on for **support**?

Three horizontal grey bars for writing.

How could those around you **better support** your progress?

Five horizontal lines for writing.

How can you **better ask for / receive** this support?

One horizontal grey bar for writing.

GREATNESS

What traits of "Great" leadership do you need to focus on?

What is a self-limiting belief that you think is **holding you back** from exhibiting one of the above traits?



SECTION FIVE

PERSONAL GOALS *AND OBJECTIVES*



ADDRESSING FEARS

What are **three things that worry you** that you want to address this year?

What two worries/fears do you believe may **appear** or become relevant over the next year?

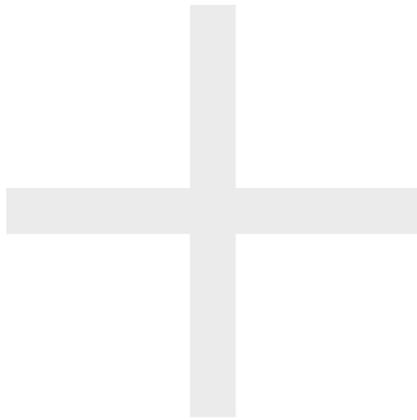
What is **one thing** you can do to begin tackling these fears?

MANAGING MY TIME - ENERGY RELATIONSHIP

On the T-chart below, note at least a dozen **experiences** (or responsibilities) from the past year that either...

GAVE YOU ENERGY

ZAPPED YOUR ENERGY



What were the five **peaks** (highest highs) listed on the chart?

Five horizontal gray bars stacked vertically, intended for writing the five peaks identified on the chart.

What were the three **valleys** (lowest lows) listed on the chart?

Three horizontal gray bars stacked vertically, intended for writing the three valleys identified on the chart.

What habits and conditions (**anchors**) will inevitably lead me to **more valleys** (lows)?

What practices and improvements (**rockets**) will inevitably lead me to **more peaks** (highs)?

MY "ROCKS" PLANNER

Within the below chart, and using all work thus far, indicate your "rocks" (benchmarks, objectives, goals, resolutions).

	30 DAYS	90 DAYS
Personal		
Community		
Family		
Business		
Health		

Within the below chart, and using all work thus far, indicate your “rocks” (benchmarks, objectives, goals, resolutions) that extend beyond the next three months of this next year.

	6 MONTHS	1 YEAR
Personal		
Community		
Family		
Business		
Health		





FINAL NOTES

Next year, I **COMMIT TO:**

Spending more of my time...

(Time Management, Page #4)

While leaning into my top Personal Value...

(Top Personal Values, Page #19)

And asking for support from...

(Team and People, Page #28)

As I preempt my fears by...

(Fear, Page #32)



So that I can achieve my greatest professional challenge...

(Next Year, Page #24)

And offer myself more pride at work when I achieve...

(Next Year, Page #25)

While exhibiting more of my "Best Self", which is...

(Your Best Self Vision, Page #9)

Ultimately changing my life by...

(Business & Personal Integration, Page #18)

TAKE A MOMENT TO REFLECT.

Pay attention to the emotions rising to the surface, the discomfort entering your mind, and the excitement you hold for the future. These are all a result of your reactions to the steps you now know you must take.

After reflecting on the previous year, establishing an understanding of what you look like at your best, determining your purpose, priorities, values, needs, goals, fears, and intentions – you are now in an opportune position to **Discover Your Path Forward**.

There's now only one last thing to do...

MAKE IT HAPPEN!



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