

Business Mastery

§1 Set a Strong Foundation

Life Planning

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Chapter 2 Slides

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Life Planning

Goal Setting

- Setting Realistic Goals
- Purpose, Priorities, and Goals
- Goal Setting Techniques
- Goal Setting Enhancements
- Clarify Your Life Vision
- Ranking Goals

Strategic Planning

Follow-Through

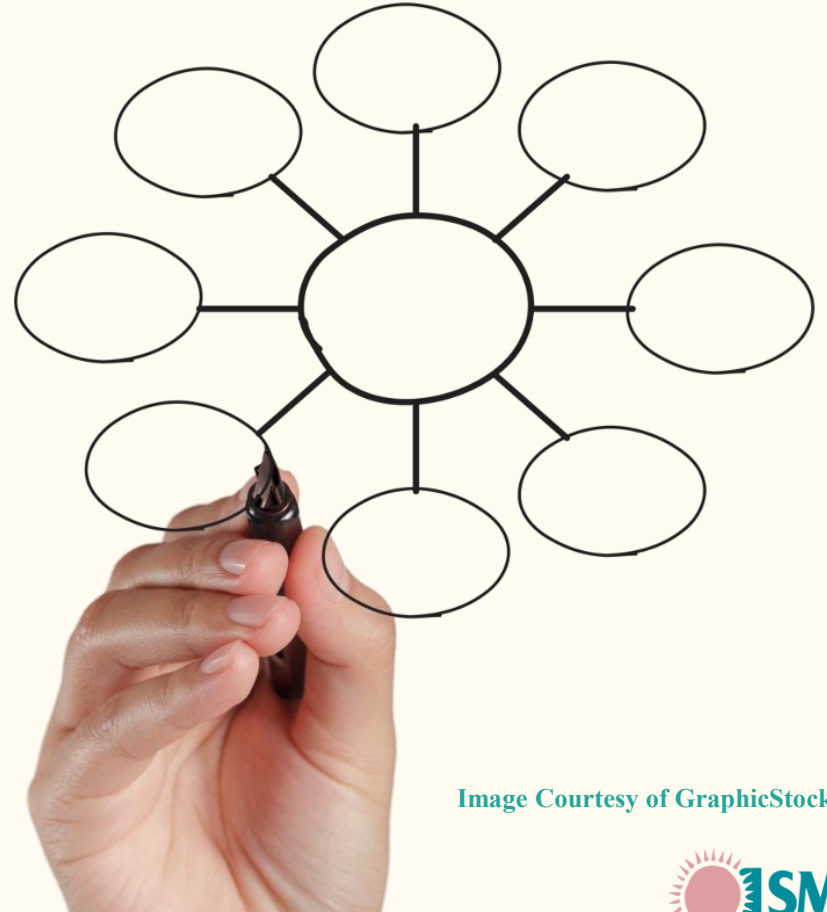


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KEY

Terms

☐ Affirmations

☐ Audio

Recordings

☐ Collage

☐ Creative

Visualization

☐ Goal

☐ Goal Setting

☐ Mind Mapping

Technique

☐ Miniature Replica

☐ Outline

Technique

☐ Picture Book

KEY

Terms

- ❑ **Picture Board**
- ❑ **Priorities**
- ❑ **Purpose**
- ❑ **Reticular
Activating
System**

- ❑ **SMARTER Goals**
- ❑ **Strategic
Planning**
- ❑ **Vision Box**

Goal Setting

- The key to turning dreams into reality.
 - Tied into the **reticular activating system (RAS)**, a network of neural tissue connecting the spinal cord and brainstem to the thalamus and cerebrum.
 - Regulates alertness and attention.
 - Believed to be the center of arousal and motivation.



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Setting Realistic Goals

- Set aside some time to think about your goals and put them into writing.
- Resist unrealistic deadlines or creating too many goals for you to accomplish.
- Do not lose sight of the big picture.
- It's a balancing act!



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Purpose, Priorities, and Goals

- **Purpose:** General direction, theme, ongoing process, never ends.
- **Priorities:** Areas of general concern.
 - Less vague and not so all encompassing as purposes, yet not as specific as goals.
 - Priorities are statements of intention that are connected with values.

Purpose, Priorities, and Goals (*cont.*)

- **Goals:** Specific things, events, or experiences that have a definite completion, and you can objectively know when you've achieved them.
- Effective goals have the characteristics found in the acronym of **SMARTER**.



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SMARTER

Specific
Measurable
Attainable
Realistic
Timelined
Enthusiastic
Rewarding



Figure 2.1,
page 15

Goal Setting Techniques

- Effective goal setting is the groundwork for success.
- By inscribing your intentions, you say to yourself and the world that you know you deserve to have these things happen.
- Having written goals will serve to support and teach you, enhancing your self-knowledge.



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Goal Setting Tips

- ❑ Always state your goals in the positive PRESENT TENSE. If you write in the future, they may remain in the future—never attained.
- ❑ Personalize your goals: use a pronoun (e.g., I, we, they, “your name”) in every sentence.
- ❑ Make your goals real: something you know you can accomplish on your own without help or someone waving a magic wand over you.
- ❑ Don’t use the terms “try,” “will,” “not,” “never,” “should,” “would,” “could” and “want.”
- ❑ Include deadline dates whenever possible.
- ❑ Have fun.

Figure 2.2, *page 15*

Written Goals

- Powerful declaration of your intentions
- The two most commonly used methods for goal setting:
 - **Outline format** is very effective for logical thinkers
 - Write your purpose, priorities, and list the specific goals under each priority.
 - **Mind Mapping format** is excellent for visually oriented thinkers.
 - Write the purpose in the center of a page, attach spokes to the circle listing priorities, and extend lines off of each spoke onto which you write the specific goals.

Outline Format Example

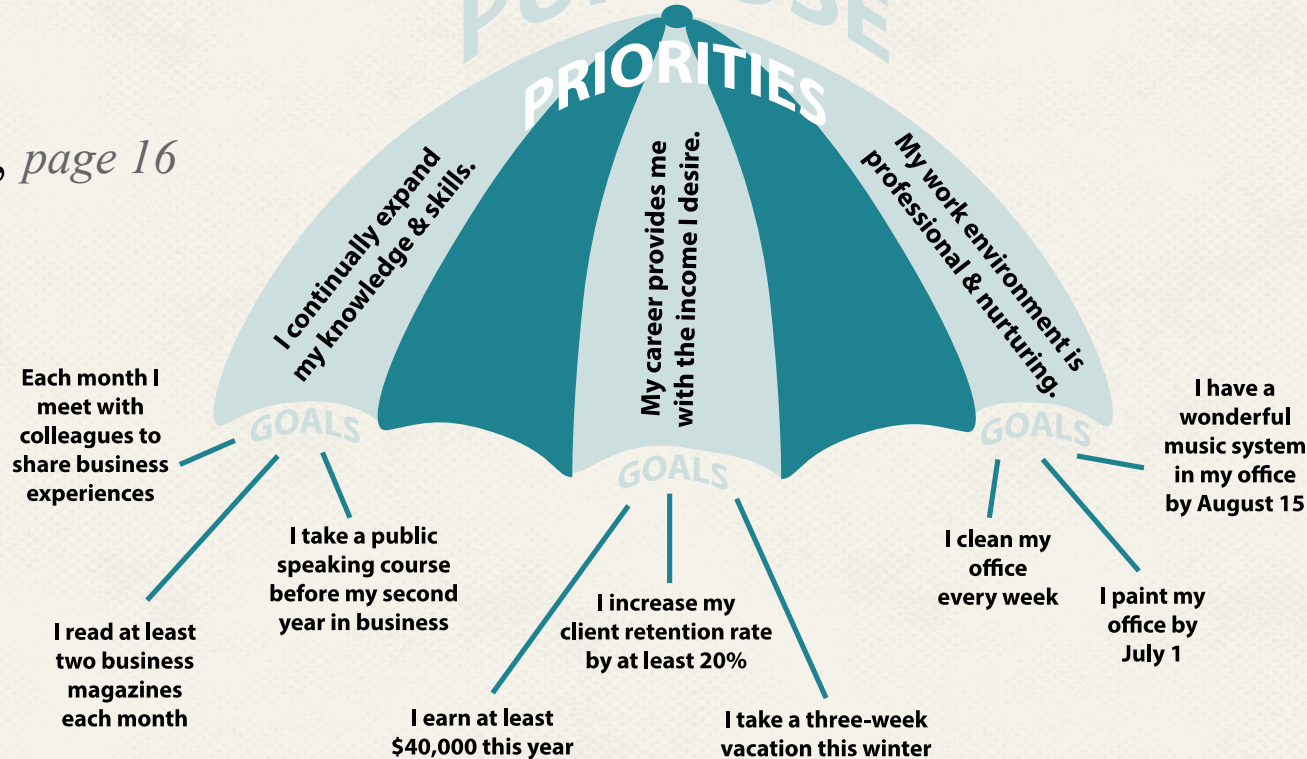
	Priority	Goals
Priority 1	I continually expand my knowledge and skills.	<ul style="list-style-type: none">• Each month I meet with colleagues to share business experiences.• I read at least 2 business magazines each month.• I take a public speaking course before my second year in business.
Priority 2	My work environment is professional and nurturing.	<ul style="list-style-type: none">• I paint my office by July 1.• I have a wonderful music system in my office by Aug 15.• I clean my office every week.
Priority 3	My career provides me with the income I desire.	<ul style="list-style-type: none">• I earn at least \$40,000 this year.• I take a 2-week vacation this winter.• I increase my client retention rate by at least 20%.

Figure 2.3
page 16

Mind Mapping Example

MY CAREER IS AN EXPRESSION OF WHO I AM

Figure 2.4, *page 16*



Goal-Setting Enhancements

- Make a **Collage**
- Compile a **Picture Book**
- Create a **Picture Board**
 - *Combination of a collage and a picture book.*
- Assemble a **Vision Box**
- Record Your Goals
 - e.g., **Audio Recordings**
- Build a Miniature Replica
 - ***Physical Representations*** are excellent tools for depicting your goal(s).



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Clarify Your Life Vision

- Before you even begin to consider developing or enhancing your practice, it's imperative to set a strong foundation by clarifying your life's purpose, priorities, and goals.
- The following exercise guides you in writing your purpose, priorities, and goals for your overall life, the next 5 years, 3 years, 1 year, and 6 months.

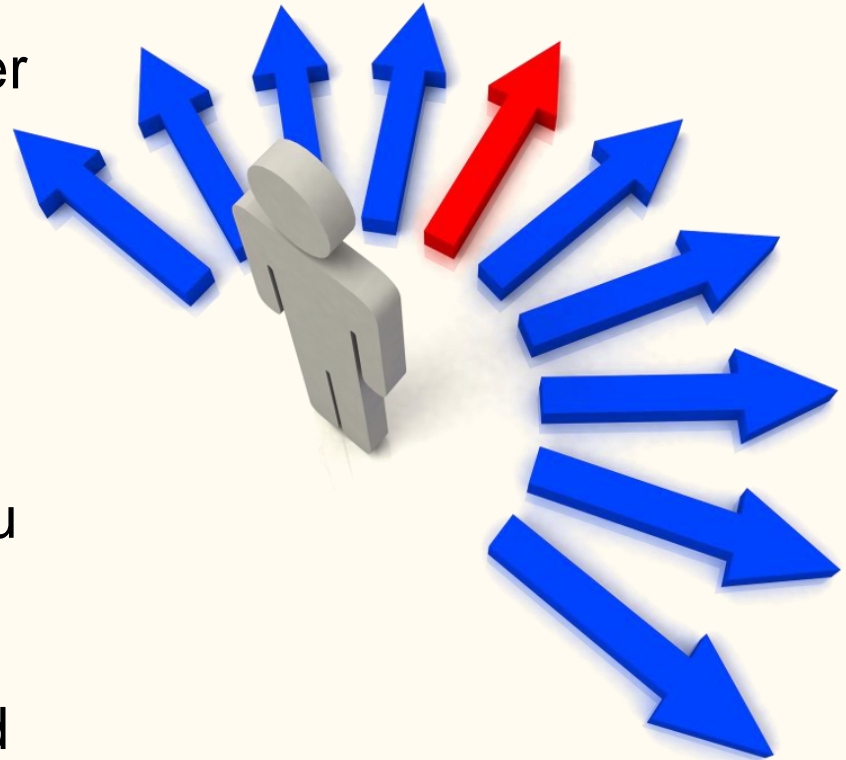


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Life Planning Exercise

- ***Think about your values, ideals and dreams, and create a statement reflecting the essence of your life.***
- ***Think about the aspects of life that are meaningful to you, and create priorities for those areas. Include all areas on the Wheel of Life.***
- ***Repeat for your 5-year, 3-year, 1-year, and 6-month plan.***

Overall Life Plan

My purpose in life is...

My major priorities in life are...

My major goals in life are...

5-Year Plan

My purpose for the next 5 years is...

My major priorities for the next 5 years are...

My major goals for the next 5 years are...

Life Planning Exercise (*cont.*)

3-Year Plan

My purpose for the next three years is...

My major priorities for the next three years are...

My major goals for the next three years are...

1-Year Plan

My purpose for the next year is...

My major priorities for the next year are...

My major goals for the next year are...

6-Month Plan

My purpose for the next six months is...

My major priorities for the next six months are...

My major goals for the next six months are...

Life Planning Exercise Reflection

- ★ What do you need to change in life to accomplish these things?
- ★ What help from others do you need to achieve success in these areas?
- ★ Who are the people that can help?
- ★ What problems do you anticipate when acting on these goals?
- ★ What will you achieve if you complete these goals?

Look Ahead

- In the previous two activities, you set your intentions and reflected back on them to determine what you may need to work on next.
- What goals inspire you the most?
- What additional reflection questions can you ask yourself to determine your personal motivation toward creating a plan for your future?
- What do you see as your next step?

Ranking Goals

- Some goals have a higher intrinsic worth, while others require more immediate action.
- Rank goals by:
 - ***Significance***
 - ***Time Priority***
- Make sure all goals have assigned target dates for completion.
- Then, numerically rank each goal according to time priority (1 being the highest).



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Strategic Planning

- Planning has many benefits:
 - Helps renew enthusiasm
 - Allows formulating sub-steps to achieve larger goal.
- A layered system: Start with your major goal, analyze it, and break it into smaller goals and steps.
 - After you've completed your strategic planning for a major goal, transfer the target dates of the specific action steps to a calendar.



Image courtesy of GraphicStock

Strategic Planning Benefits

- ❑ You're less likely to forget a major step.
- ❑ Creative ideas and brainstorming come easier.
- ❑ Goals become clarified and more real.
- ❑ You gain a better overall picture.
- ❑ You realize that some steps may require more immediate action than others.
- ❑ You gain knowledge of what is necessary to accomplish the goal.
- ❑ A more accurate timetable is developed.
- ❑ A written description of your intentions is a self-motivational tool.

Figure 2.5, *page 20*

Action Steps for Strategic Planning

1. List the current date and target date for accomplishing the goal.
2. Identify the major goal.
3. Describe the existing situation.
4. List the benefits of achieving the goal.
5. Brainstorm possible courses of action.
6. Choose the best solution.

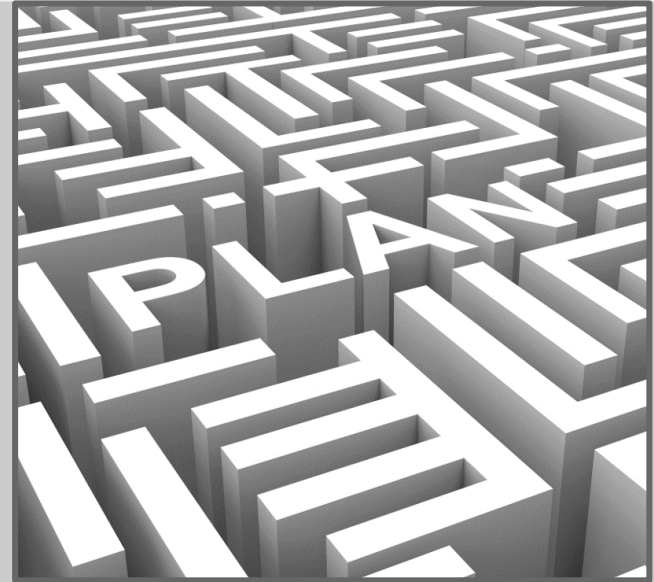


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Figure 2.6, *page 21*

Action Steps for Strategic Planning

(cont.)

7. Sketch a proposal outline.
8. Determine potential challenges and solutions.
9. Identify required resources.
10. Delineate specific action steps and target date for each step.
11. Transfer the target dates to a calendar.



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Strategic Planning Example

- ❑ **Goal:** I work with at least 25 clients per week.
- ❑ **Situation Description:** I have been in practice for almost two years. I had a corporate account with ABC Electronics, but the company relocated. Now I am averaging only 15 clients per week.
- ❑ **Benefits of Achieving This Goal:** I can meet my lifestyle needs, pay off my school loans, take a vacation and start a savings account.
- ❑ **Possible Courses of Action:**
 1. Get a part-time job at a clinic.
 2. Hire an agent.
 3. Actively market my practice.

Figure 2.5, *pp. 22-23*

Strategic Planning Example (cont.)

- ❑ **Best Course:** The most appropriate long-term solution is to actively market my practice, which could also include securing another corporate account.
- ❑ **Proposal Outline:** To have 25 clients per week, I need a base of 100 active clients: five weekly, 15 biweekly, 40 monthly and 40 occasional. I design a creative, fun marketing plan that includes increasing client retention.
- ❑ **Advantages:** By augmenting my client list, I increase the odds of achieving my goal. Once my base is established, I won't have to put in as much effort into getting new clients because I incorporate client retention techniques.

Strategic Planning Example (cont.)

❏ **Potential Conflicts/Disadvantages:**

1. I don't really like marketing.
2. I'm not sure what to do.
3. There's a new company (with four therapists) offering corporate massage.

❏ **Solutions:**

- Do clearing exercises. Remind myself that marketing is simply sharing who I am and what I do. Do some of my marketing activities with colleagues.

Strategic Planning Example (cont.)

- Read books and magazines. Take marketing classes. Work with a business coach. Invest five hours per week on marketing.
- Affiliate myself with the corporate massage company. Or determine what my differential advantage is and pursue other accounts.

❑ **Action Required to Begin:** Review my client files to determine massage frequency. Set aside at least two hours to outline my marketing plan.

❑ **Resources Needed:** Time, paper, pencils and files. Ideally, samples of other therapists' marketing plans.

❑ **Specific Steps to Achieve This Goal, Target Date**

Highlights

Life planning involves developing a mission statement, identifying goals, and mapping out a strategic plan of action.

A purpose or mission statement reflects the essence of your life and work—it's a key ingredient in life and career planning.

Goal setting anchors your dreams into practical, everyday steps to reach your goals.

Make sure your goals are SMARTER.

Highlights (*cont.*)

Ensure you achieve your goals by writing them down. Use them as a guidepost to plan everyday activities and measure success on a daily, weekly, and monthly basis. Assign a deadline date to each goal.

Set goals in positive present tense, using complete, personalized sentences.

Rank your goals in terms of overall importance and time priority.

Creative ways to magnify the power of your goals include: writing your goals, making a collage, creating a picture book, and making an audio recording of your goals.

Highlights (*cont.*)

It's imperative to set a strong foundation for developing or enhancing your practice by clarifying your life's purpose, priorities, and goals.

Strategic planning involves identifying specific tasks and timelines needed to accomplish goals. It requires a detailed analysis to break large goals into small goals, and to create a master list of required actions.

Planning is only part of the work needed for results—you must take action! Refer to your plans frequently to be sure you're on track for achieving your goals.