

**Goal Setting Workbook**

**Goal Setting Template**

# **Career Success Masterclass**



**Goal Setting Template and Goal Setting Exercises  
to Help You Achieve Everything that You Deserve  
in Your Life and Sales Career**

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# Introduction

## Welcome to the Career Success Masterclass Goal Setting Workbook.

The intention of this workbook is to accompany the PDF Download and particularly the accompanying audio download. Simply join our mailing list for free access to a 45 minute MP3 that covers all of these exercises

- 1) We would recommend that you commit an hour to working through this workbook perhaps together with the accompanying audio book.
- 2) We recommend that you complete this alone as some of the exercises require you to be extremely introspective.
- 3) We recommend that you are 100% honest with yourself throughout this entire goal setting process.
- 4) We recommend that upon completion of this workbook that you file it away for future reference

Good luck with your goal setting and we sincerely hope that it helps you to achieve everything that you want from life and your career in sales



# Why does this form of goal setting work?

- 1) It uses all of your Brain!
- 2) It uses a SMARTER Goal Setting Technique

Quite simply with the techniques that we will learn here you will engage both your conscious and subconscious brain to help you achieve your goals. It is estimated that your conscious brain can process 16 bits of information per second, compared to our non-conscious brain that absorbs 11 million bits per second!

Can you imagine the difference if we multiply our brain processing capacity by 687,500!!

Our sub-conscious brain is both the creative part of our brain and the part that processes incredible amounts of information from our sense organs such as breathing, heartbeat, and blood circulation (not to mention instincts and emotions!) It does all this without you even realizing and in the same way it will help you to achieve your goals.

**This form of Goal Setting uses the Aaron Wallis SMARTER Goal Setting Technique**

The form of goal setting that we have developed here is SMARTER Goal Setting. We've all heard of **SMART** (**S**pecific, **M**easurable, **A**ttainable (sometimes achievable), **R**ealistic and **T**ime Phased or **T**ime Bound) as a way of goal setting but who *really* wants a goal that is both realistic and achievable?

**SMARTER goal setting** gives you all of the form and discipline of SMART goal setting but with the advantages of **visualization (Envisage)**, **Motivation**, **Relevance**, **Responsibility (Consequences)** and an **affirmation** statement.

The SMARTER technique we define as follows:

**S – Specific**

**M – Motivational** – the goal has to give you the motivation of going through the 'pain' and 'sacrifice' to achieve it.

**A – Affirmation** – written in a positive, personal way in the present tense

**R – Responsible** – you must take responsibility to achieve the goal and set a consequence if you do not meet it by the date you choose. This must be 'bad' enough to also motivate you!

**T – Time phased** – there is a deadline and milestone steps along the path so that you can see that your goal, bit by bit, is being achieved.

**E – Envisage** – you can envisage the outcome in your mind's eye.

**R – Relevant** to who you are and where you are at this stage

Don't worry if this doesn't make sense quite yet as the exercises will help you to naturally set a SMART GOAL

**WARNING :** These exercises will take you 30 minutes to an hour and might, just might, change your life. Is that worth 30 to 60 minutes?

### Exercise One – Long lost Friend: “The Friend I’ve not seen for 3 years!”

1. Imagine the scenario. You have a really good friend who knows you really well. It is 3 years from today.
2. For some reason, life just got in the way; you haven’t spoken of, heard from or heard about this friend for the last 3 years.
3. You unexpectedly bump into each other in a hotel lobby.
4. They are delighted to see you and say “Wow, what a surprise, how are you? I haven’t seen you for what, three years! What are you doing what have you been up to?”

Now answer the following questions:

**I live in (town, city, village – type of dwelling):**

**The car that I drive is a:**

**I am making a living by (job title/job role):**

**I am earning (£x per year):**

**I have been on holiday to:**

**My hobbies and interests are:**

**I have given up/I have taken up:**

**Since I’ve last seen you a new skill that I have acquired is:**

**My partner is:**

**Other:**

## Exercise Two: The Million Pounds Giveaway

Answer the following. If I was given a million pounds today on the proviso that I had to spend it immediately I would buy the following ten things. The emphasis here is on spending it, you cannot invest it in shares or put it in the bank, you have to BUY STUFF with it. Go with your gut feeling, do it quickly, just rattle off the ten things:

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

### Exercise Three: It's Your Funeral

I have lived a long, fruitful and enjoyable life. In the eulogies at my funeral I am described by the people who know me best (life partner, close friends, close colleagues, children, mentors, etc.) as follows – ten descriptive words. Imagine what they'd say, how they'd say it. You've achieved everything that you wanted in a LONG AND FRUITFUL life – what are they saying?

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

**Exercise Four – Charity Giveaway: If I had £100,000 to give to a single charity I would give it to:**

**Exercise Five: The last time I felt was**

**The last time that I felt success was:**

**The last time that I did something that I really, really didn't want to do, but did it anyway, was:**

**The last time I felt truly happy was:**

**The last time I felt truly at peace was:**

**The last time I felt really proud of myself was:**

**The last new skill that I developed was:**

**The last time that I felt totally 100% focused was:**

## Exercise Six 'Paint your Life'

Get a large sheet of paper – A3 is ideal (but if not use the box below) and draw a picture of what life looks like ten years from today. If you can't draw a Ferrari just draw a car and write Ferrari on the side? It's not a test of your drawing ability

A large, empty rectangular box with a thin black border, intended for a drawing. It occupies the central portion of the page below the instructions.

## Exercise Seven 'What's My Goal'

Write down at least three goals that you would like to set for yourself today. Be as bold and ambitious as you want to be. The more the better but a minimum of three.

1.

2.

3.

4.

5.

## Exercise Seven 'What's My Goal' – Part Two

Now ask yourself why you want to achieve these goals. Write down at least twenty reasons for each of them. Don't worry how selfish or materialistic you potentially are being here. Don't worry if the reasons would sound futile to anyone else. If you want the million pounds, to buy the Ferrari to impress your school mates, that's fine – WRITE IT DOWN. Write down all of the reasons why you really, **REALLY**, **REALLY**, **REALLY** want to achieve these goals.

**Goal Number One: My Goal is:** \_\_\_\_\_

The Twenty reasons why I want to achieve each of my goals are (scribble the reasons don't worry about being neat here!)

|    |  |
|----|--|
| 1  |  |
| 2  |  |
| 3  |  |
| 4  |  |
| 5  |  |
| 6  |  |
| 7  |  |
| 8  |  |
| 9  |  |
| 10 |  |
| 11 |  |
| 12 |  |
| 13 |  |
| 14 |  |
| 15 |  |
| 16 |  |
| 17 |  |
| 18 |  |
| 19 |  |
| 20 |  |

Goal Number Two: My Goal is: \_\_\_\_\_

|    |  |
|----|--|
| 1  |  |
| 2  |  |
| 3  |  |
| 4  |  |
| 5  |  |
| 6  |  |
| 7  |  |
| 8  |  |
| 9  |  |
| 10 |  |
| 11 |  |
| 12 |  |
| 13 |  |
| 14 |  |
| 15 |  |
| 16 |  |
| 17 |  |
| 18 |  |
| 19 |  |
| 20 |  |

Goal Number Three : My Goal is: \_\_\_\_\_

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12
- 13
- 14
- 15
- 16
- 17
- 18
- 19
- 20

## Exercise Eight – “I am financially free”

You have won the lottery or somehow acquired millions and millions of pounds. Certainly enough so you don't have to worry about bills coming, loan repayments or your kid's education.

You're absolutely loaded! So loaded you won't ever have to check your account because it's simply not possible to spend the amount of cash that you have. You are absolutely, unbelievably, obscenely wealthy. Bill Gates and Branson combined kind of wealthy.

Picture this incredible wealth. Now, what are you going to do, how are you going to fill each day. 3 things:

1.

2.

3.

## **Why have you made me complete these exercises? What's the point? Why will they help me set my goals? I WANT THE TEMPLATE! I WANT TO SET MY GOALS, NOW!**

In the last thirty minutes or so you have found out the following about yourself

**Where you want to be in 3 years/5 years**  
**How you would like to be perceived by your friends and family**  
**What drives and motivates you**  
**What's important to you**  
**What lines you would never cross – your moral boundaries**  
**What you really, REALLY want out of life?**  
**What your greatest achievements are and what you are most proud of**  
**Whether you measure your own performance**  
**How and whether you motivate and develop yourself**  
**Things would you like to achieve over the next three years**  
**What you really want to do**

### **To explain further:**

**Exercise one: 'Long lost friend'** gives you the answers to where are you going/where you want to be in three years time. This gives you your short-medium term goals

**Exercise Two 'Millionaire'** gives you your long term goals – all of these with focus, goal setting and a large dose of discipline you will be able to achieve in your lifetime, if not even in the next decade

**Exercise Three 'It's Your Funeral'** gives you your values, what you believe in, what you stand for and the direction that you want your life take.

**Exercise Four 'Charity'** tells you how you would like to make a contribution to the wider society, and what you would like to do to help others

**Exercise Five 'The Last Time'** helps you to appreciate life and enables you to know when you are experiencing certain 'feelings'. It gives you a point of reference for the future to feel that experience again.

**Exercise Six 'Paint your life'** enables you to visualise – one of the most powerful tools to enable you to achieve your goals – but had I asked you to visualise you probably wouldn't have bothered! Drawing on your creative half of your brain when setting goals gives you at least twice, if not ten times the chance of actually realising it!

**Exercise Seven 'What's My Goal'** Is the goal really what you want? Is the goal that you have set for yourself really the goal that YOU really want to achieve? DO NOT set goals for anyone else. DO NOT set goals because you think that you're at that point in life when you should. You will never make a million pounds unless you really, REALLY want to. You will never have a 32" waist unless YOU really, really want one. You will never drive that flash car unless YOU REALLY, REALLY WANT TO! So don't do it for your friends, don't do it for your partner. If it's WHAT YOU REALLY, REALLY WANT THEN DO IT for YOU

**Exercise Eight 'I am Financially Free':** This exercise indicates how you would like to spend your time and how you would busy yourself if you were not restrained by the need to earn. Listen to this exercise – could you do more of this in your life ? Could you even do this for a living? Just a thought....

**If you know your purpose, your values, your passions, your ambitions, your needs, your drivers and have pride in the person that you are now, and the person that you will become, you will achieve your goals.**

## Goal Setting Document – We’re now finally ready to start looking at the Goal Setting Process itself!

**Why do I Really Want Out of Life? Look at the ‘What’s My Goal’ exercise but examples could be: money, friends, security, success, recognition, development, progression opportunities, culture, focus for life, stability, feeling part of the team, being liked, fun, etc. your choice – write it down!**

**What Don’t I Want Out of Life? What am I scared by if I do not realize my potential? Examples could be: loneliness, underachievement, not having the means (financial or health) to do what I want, etc.**

**Motivations – Knowing what motivates you will help you set the right goals. Below are purely examples. I'm sure your own will be totally different. If they are irrelevant to you leave blank, if there are other motivators add them to the bottom**

| What motivates me most, score accordingly – 10 =most, 1 = least (if you have the time try to then put them in order)                 |  |
|--------------------------------------------------------------------------------------------------------------------------------------|--|
| Money                                                                                                                                |  |
| Recognition                                                                                                                          |  |
| Reward (i.e. prizes, receiving reward that is not purely monetary)                                                                   |  |
| Success - being and feeling successful                                                                                               |  |
| Being liked and others having a positive perception of me.                                                                           |  |
| Doing better than my peers                                                                                                           |  |
| Having all of the latest gadgets, clothes (Material possessions)                                                                     |  |
| Career progression                                                                                                                   |  |
| Education and Personal development                                                                                                   |  |
| Fear (healthy fear not 'horror fear', i.e. fear of losing job, fear of not being able to pay bills, fear of not achieving potential) |  |
| Service – becoming a better person, helping people, creating a more humane society?                                                  |  |
| Being Respected                                                                                                                      |  |
| Achievement – being the best I can possibly be                                                                                       |  |
| Health and physical fitness                                                                                                          |  |
| The independence to do what I want to do (Financial Freedom):                                                                        |  |
| Peace of Mind                                                                                                                        |  |
| Other:                                                                                                                               |  |
| Other                                                                                                                                |  |

**What de-motivates me? i.e. what external influences could take effect on my own motivations?**

**What are my values – what lines won't I cross? What business principals do I want to see upheld? Review the 'It's Your Funeral' exercise as this will really help you to articulate these.**

**What habits/behaviours do I need to change to achieve my goal?**

| What is my direction – where do I want to be in? i.e. Where am I living, what is my job, what am I earning, what is my personal situation, what makes me happy, where do I holiday, what am I doing to further my education, etc. The 'Long Lost Friend' exercise will help you here: |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 1 Year                                                                                                                                                                                                                                                                                |  |
| 2 Years                                                                                                                                                                                                                                                                               |  |
| 3 Years                                                                                                                                                                                                                                                                               |  |
| 5 Years                                                                                                                                                                                                                                                                               |  |
| 10 Years                                                                                                                                                                                                                                                                              |  |

| What training/further development do I need to achieve these long term objectives? |
|------------------------------------------------------------------------------------|
|                                                                                    |

**If I could change one thing about me (behaviors, habits, etc) to make me more successful what would this be?**

**How could I achieve more each day? What potential sacrifices (watching less TV, going out one night less per week, playing golf once a week rather than two, spending less time chatting to colleagues, etc.)**

# **If you've got this far then REALLY, REALLY, WELL DONE! We're now ready to actually set the goal and look at the GOAL SETTING TEMPLATE**

## **Setting Goals**

Whilst this may sound strange, 'new agey' and a bit far out this process will work. This process has been proven to be highly effective by engaging all of your brain to achieve your goals and applying the SMARTER technique.

You need to follow and complete the following steps:

- 1) Complete the following letter overleaf
- 2) Spend a few moments visualizing yourself having achieved the goal – what does it feel like, what does your life look like
- 3) Print it off
- 4) Physically post it to yourself!

## **Hand on, this sounds nonsense, why will this work?**

The effort of writing down your goals, completing an envelope, fixing a stamp and posting the letter will send your subconscious reeling. Many people have already made positive changes to enable them to achieve their goal before they receive their letter.

Then there is the pleasure in receiving a hand written letter (a rare thing nowadays). Upon receipt, open and read the document and keep somewhere where you can regularly refer to the document and update as necessary – a wallet or purse is ideal.

Now I know you're probably thinking that this is very 'far out' and 'new age' and not the sort of thing a sales professional should undertake but do it. What have you got to lose, 40p on a First Class Stamp to achieve your goal?

# **DO IT! If you only ever complete one self development exercise in your life – ensure it is this one!**

**FIRSTLY:** Select your main goal from the ones that you have chosen. The goal that is going to make you jump out of bed each morning. The goal that you have a really burning desire to achieve.

**Complete by overtyping the arrowed brackets < > and delete all instructions and hints to make it a clean document or simply get a fresh sheet of paper and follow the instructions!**

<Your Name>  
<Your Address1>  
<Address1>  
<Town/City>  
<County>  
<Postcode>

<Date>

Dear <Your Name>

I deserve to be everything that I want to be. I therefore on this day set a goal that will be achieved in its entirety by the dates detailed below.

|                                                                                                               |
|---------------------------------------------------------------------------------------------------------------|
| <b>My Goal &lt;title, make it specific, relevant and tangible&gt;</b>                                         |
| <br><br><br><br><br><br><br><br><br><br>                                                                      |
| <b>My goal will be achieved on &lt;Date&gt;:</b>                                                              |
| <br><br><br><br><br><br><br><br><br><br>                                                                      |
| <b>My Goal will be achieved by:<br/>&lt;Detail the qualities you will need to enable you achieve this&gt;</b> |
| <br><br><br><br><br><br><br><br><br><br>                                                                      |

**My performance against this goal will be measured by the following milestones <Name and date the steps along the way to confirm that you are on course>:**

|    | <b>MILESTONE</b> | <b>DATE</b> |
|----|------------------|-------------|
| 1. |                  |             |
| 2. |                  |             |
| 3. |                  |             |
| 4. |                  |             |
| 5. |                  |             |
| 6. |                  |             |
| 7. |                  |             |

**The obstacles that I potentially face are:**

|  |
|--|
|  |
|--|

**I overcome these obstacles by <solutions>:**

|  |
|--|
|  |
|--|

|                                                                                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>I will reward myself when I achieve my goal by:</b>                                                                                                           |
|                                                                                                                                                                  |
| <b>If I do not achieve this goal I will do the following &lt;consequences, i.e. give £1000 to charity, wear a chicken costume, whatever will spur you on&gt;</b> |
|                                                                                                                                                                  |

On <Date that Goal will be achieved> I am <affirmation statement: in the present tense. Describe what you will be when the goal is achieved, what does life look like, feel like, how has it improved, i.e. "I am earning in excess of £60,000 p.a.", "I am fit, healthy and have a 32" waist", "I am a graduate in Sports Psychology", etc>

I am a fantastic and unique person and I look forward to being who I plan to be upon achieving this goal. All my love,

<SIGN>

<FULL NAME>

<DATE>

Now if you really want this to work also copy in five other people to this letter but I appreciate that this may be 'one step too far out of your comfort zone'! We will happily be one of your 'checks' here at Aaron Wallis. Post the document to Aaron Wallis, Norfolk House, 499 Silbury Boulevard, Central Milton Keynes, Buckinghamshire, MK9 2AH or email to [info@aaronwallis.co.uk](mailto:info@aaronwallis.co.uk)

# CONCLUSION



## CONGRATULATIONS

**We really hope that you've enjoyed these exercises and this goal setting techniques.**

**This is the result of over five years of looking at and applying numerous goal setting techniques and we've broken them down and combined them to achieve this powerful tool.**

**We hope that you've found it a worthwhile use of your time and we'd love to hear how things have worked for you.**

**We wish you every good luck in the world in achieving everything that you set out to do.  
Good luck with your goal setting!**

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