



# Goal Planning Worksheets

Swift Digital Stationery

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# Welcome

## Goal Planning Worksheet

Congratulations on taking this powerful step toward creating the life you truly want! You're not just getting another set of worksheets – you're getting a complete guidance system that will walk with you every step of the way.

### What Makes This Different?

Most goal-setting resources leave you staring at blank pages, wondering where to start. Not here. I believe in holding your hand through the entire process, which is why you'll find:

- **Step-by-step directions** for every single worksheet
- **Bonus insider tips** that most people never discover
- **Real examples** to spark your own ideas
- **Troubleshooting** help for when you get stuck
- **Motivation boosters** to keep you moving forward

### Your Complete Goal Planning System Includes:

- Personal & professional goal setting templates
- SMART goals framework with guided examples
- Action step breakdowns that actually work
- Progress tracking systems that keep you motivated
- Obstacle identification and solution planning
- Reflection prompts for continuous growth
- Reward planning to celebrate your wins

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## Before You Begin – Your Success Mindset:

Remember: This isn't about perfection. It's about progress. Some goals will evolve, others might change completely, and that's perfectly normal. What matters is that you're being intentional about your life and taking action.

### Ready to transform your dreams into reality?

Let's dive in!

Always in your corner,

*Cherie*

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# How To Guide

## Your Step-by-Step Success Roadmap

### PHASE 1: FOUNDATION SETTING

Start Here: The Goal Categories Worksheet

#### What to do:

1. Look at the 6 main life areas: Personal, Health, Family, Career, Travel, Money
2. Don't overthink – write down what first comes to mind for each area
3. Aim for 1–3 goals per category (you can always add more later)

**Bonus Tip:** Stuck on ideas? Ask yourself: "What would make me excited to wake up each morning?" Write those dreams down, even if they seem impossible right now.

**Pro Insider Secret:** Most people skip the "why" behind their goals. For each goal you write, add one sentence about why it matters to you personally. This becomes your motivation fuel later.

### PHASE 2: GOAL REFINEMENT

The SMART Goals Framework – Made Simple

#### What to do:

1. Take your favorite 3–5 goals from Phase 1
2. Run each one through the SMART filter:
  - **Specific:** Instead of "get healthy" → "lose 20 pounds"
  - **Measurable:** Add numbers, dates, or clear markers
  - **Achievable:** Stretch yourself, but stay realistic
  - **Relevant:** Does this actually matter to your life?
  - **Time-bound:** Set a real deadline

**Bonus Tip:** If a goal feels too big, break it into smaller 90-day mini-goals. Your brain loves achievable chunks!

**The Magic Question:** For each SMART goal, ask: "What would have to be true for this to definitely happen?" Write down those conditions – they become your action items.

## PHASE 3: ACTION PLANNING

### Breaking Down Your Goals into Daily Wins

#### What to do:

1. Choose your #1 priority goal
2. Work backwards from your deadline
3. Identify 5–7 major steps needed
4. Break each major step into smaller weekly actions
5. Schedule the first action for this week

**Bonus Tip:** The "2-minute rule" – if an action takes less than 2 minutes, do it immediately rather than writing it down.

**Game-Changer Strategy:** Batch similar actions together. Making phone calls? Do them all in one focused session. Research tasks? Block out dedicated research time.

## PHASE 4: OBSTACLE PLANNING

### Preparing for Challenges (Because They're Coming!)

#### What to do:

1. For each major goal, brainstorm 3–5 potential obstacles
2. Be honest – what usually derails you?
3. For each obstacle, write 2–3 specific solutions
4. Identify your "danger zones" (times, places, emotions when you're most likely to quit)

**Bonus Tip:** Create "if-then" statements: "If I feel like skipping my workout, then I'll do just 10 minutes instead." This pre-programs your response.

**Reality Check:** The goal isn't to avoid all obstacles – it's to bounce back faster when they hit.



## PHASE 5: PROGRESS TRACKING

### Staying Motivated with Visible Progress

#### What to do:

1. Choose how you'll measure progress (weekly check-ins work best)
2. Rate your progress from 1–10 each week
3. Celebrate ANY forward movement
4. Note what's working and what needs adjustment
5. Update your action steps based on what you learn

**Bonus Tip:** Take progress photos, keep a one-sentence daily journal, or use a simple habit tracker app. Visual progress is incredibly motivating.

**The Plateau Buster:** When progress stalls, change just one small variable. New time of day, different approach, or add an accountability partner.

## PHASE 6: REFLECTION & ADJUSTMENT

### Learning and Growing from Your Journey

#### What to do:

1. Monthly reflection: What's working? What isn't?
2. Adjust your goals if needed (this is wisdom, not failure!)
3. Celebrate all progress, even small wins
4. Identify patterns in your success and obstacles
5. Plan improvements for the next month

**Bonus Tip:** Keep a "wins journal" – record every small victory. On tough days, read through it for instant motivation.

## PHASE 7: REWARDS & CELEBRATION

### Fueling Your Motivation with Meaningful Rewards

#### What to do:

1. Plan specific rewards for milestone achievements
2. Make rewards meaningful but not counterproductive
3. Include both small weekly rewards and bigger milestone celebrations
4. Share your wins with supportive people
5. Use rewards as motivation fuel, not just afterthoughts

**Bonus Tip:** The best rewards often aren't material – they're experiences or time doing something you love.

## QUICK START GUIDE – FIRST 30 MINUTES

1. **Minutes 1–10:** Complete the Goal Categories worksheet with your first instincts
2. **Minutes 11–20:** Pick your top 3 goals and make them SMART
3. **Minutes 21–30:** Write down the first action step for each goal and schedule when you'll do it this week

**That's it! You're officially started and ahead of 90% of people who set goals.**



## TROUBLESHOOTING COMMON CHALLENGES

### "I don't know what I want"

- Start with what you DON'T want, then flip it
- Look at what you admire in others' lives
- Ask: "What would I do if I knew I couldn't fail?"

### "My goals feel overwhelming"

- Break them into smaller pieces
- Focus on just the next step, not the whole journey
- Remember: you don't have to see the whole staircase to take the first step

### "I keep starting and stopping"

- Lower the bar for what counts as progress
- Find an accountability partner
- Review your "why" – is it compelling enough?

### "I don't have time"

- Audit where your time actually goes for one week
- Look for 15-minute pockets you can use
- Remember: you have the same 24 hours as everyone else who's achieving their goals

# GOALS

## PERSONAL

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## HEALTH

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## FAMILY

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## CAREER

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## TRAVEL

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## MONEY

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## SEASONAL

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## FOUNDATION

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**Goal:**



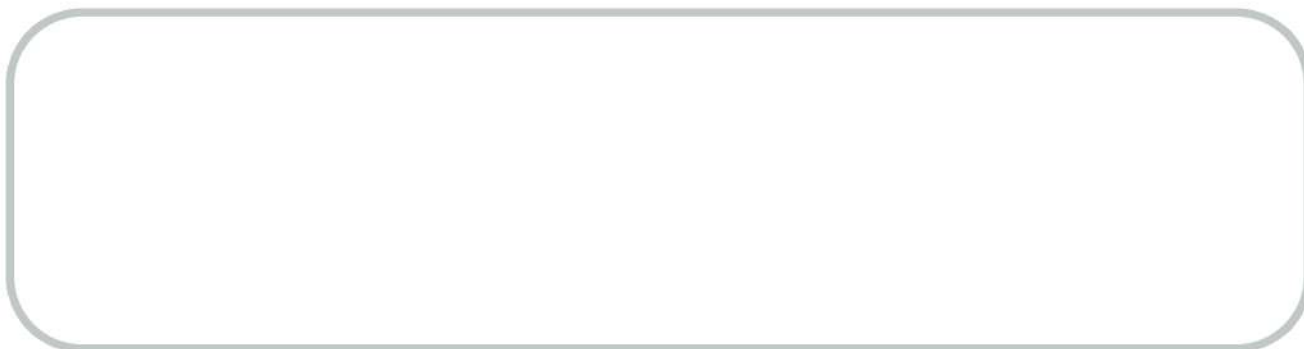
Why This Goal Matters: \_\_\_\_\_

**Goal:**



Why This Goal Matters: \_\_\_\_\_

**Goal:**



Why This Goal Matters: \_\_\_\_\_

# SMART GOALS

GOAL 1

GOAL 2

GOAL 3

## SPECIFIC

What exactly  
needs to be  
achieved?

## MEASURABLE

How will you know  
you've achieved it?

## ACHIEVABLE

Is it realistic? What  
resources do you  
need?

## RELEVANT

Why is it  
important right  
now?

## TIME BOUND

What's your  
deadline?



# ACTION STEPS

	GOAL 1	GOAL 2	GOAL 3
Step 1			
Step 2			
Step 3			
Step 4			
Step 5			

# OBSTACLES & SOLUTIONS

	OBSTACLES	SOLUTIONS
GOAL 1		
GOAL 2		
GOAL 3		



# TRACKING PROGRESS

	GOAL 1	GOAL 2	GOAL 3
Step 1			
Step 2			
Step 3			
Step 4			
Step 5			

# REFLECTION

Goal 1

Goal 2

Goal 3

What's working well?

What challenges have you faced?

What would you do differently next month



# REWARD

How will you celebrate completing this goal?

Goal 1

Goal 2

Goal 3

# Thanks

## Congratulations, Goal Achiever!

You've just completed something most people never do – you've created a clear, actionable plan for your most important goals. That puts you in the top 3% of people who actually write down their goals (and research shows written goals are 42% more likely to be achieved!).

### WHAT YOU'VE ACCOMPLISHED:

- ✓ Clarity: You now know exactly what you want and why it matters
  - ✓ Strategy: You have a proven system for making progress
  - ✓ Preparation: You're ready for obstacles and know how to overcome them ✓
- Momentum: You've taken the hardest step – getting started

### YOUR NEXT STEPS:

1. Schedule your first action within the next 48 hours (strike while motivation is hot!)
2. Set up your tracking system so you can see progress immediately
3. Tell someone about your most important goal for accountability
4. Review this system weekly to stay on track

### SPECIAL BONUS TIPS FOR LONG-TERM SUCCESS:

**The 1% Rule:** Aim to improve just 1% each day. Small, consistent actions compound into massive results over time.

**The Power of Environment:** Set up your environment to support your goals. Make good choices easier and bad choices harder.

**The Review Ritual:** Every Sunday, spend 15 minutes reviewing your progress and planning the upcoming week. This simple habit keeps you on track.

**The Flexibility Factor:** Your goals may evolve – that's growth, not failure. Stay committed to your vision but flexible in your methods.

## A Personal Note:

Goal achievement isn't about being perfect. It's about being persistent. There will be days when you don't feel motivated, when progress seems slow, or when obstacles feel overwhelming. That's normal and expected.

What separates successful people from everyone else isn't that they don't face challenges – it's that they keep going anyway. They use systems (like the one you now have) to create momentum even when motivation fades.

You have everything you need to succeed. The worksheets are just tools – the real power was inside you all along. Now you've organized that power into a clear plan of action.

### REMEMBER:

- Progress over perfection
- Consistency over intensity
- Action over endless planning

Your future self is counting on the decisions you make today. You've already made the most important one by investing in this system and completing the work.

Now go make it happen. You've got this!

*Cherie*

*P.S. Keep these worksheets handy for regular review. Goals achieved with intention and planning feel infinitely more satisfying than accidental successes. You're building a life by design, not by default.*



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