Scriptify Success

GOAL PLANNING WORKSHEET

Set Goals the Right Way

Look back honestly. Choose what matters.
Plan your first milestone.

How to use this worksheet

- Set aside one quiet evening and work through the steps in order, because each step builds on the one before it.
- Be honest with yourself. Nobody else needs to see these answers.
- Type your answers on screen, or print the pages and write by hand. Print the Monthly Action Tracker once for each month.
- Keep your big goal private. Share it only with your family.

1	2	3	4	5
Look back at your last 3 years	**Find what still matters**	**Your vision and big goal**	**Milestones and actions**	**Track daily, review every quarter**

Look Back at Your Last 3 Years

For each area of your life, describe how each of the last three years went: the year before last, last year and this year. One year is often too short to show a pattern, while three years shows you which way your life is really moving. Then mark whether the area is progressing, staying the same or slipping.

Personal life

Look at: Health and energy · time for your own growth · a hobby that gives you energy

Ask: Do I wake up feeling energetic most days, or stressed and tired? Do I make time to learn, read or build something of my own?

THE YEAR BEFORE LAST

LAST YEAR

THIS YEAR

Over these 3 years, this area is: ☐ Progressing ☐ Staying the same ☐ Slipping

WHAT IS MISSING HERE

Professional life

Look at: Earnings · growth in your business or career · what really bothers you about your work

Ask: Am I moving forward or staying in the same place? Is what bothers me truly important to me, or just peer pressure?

THE YEAR BEFORE LAST

LAST YEAR

THIS YEAR

Over these 3 years, this area is: ☐ Progressing ☐ Staying the same ☐ Slipping

WHAT IS MISSING HERE

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Look Back (continued)

Finance

Look at: Saving and investing · spending · what bothers you most about money

Ask: Am I saving and investing regularly? Does my spending follow a plan or my mood? Use real figures where you can.

THE YEAR BEFORE LAST

LAST YEAR

THIS YEAR

Over these 3 years, this area is: ☐ Progressing ☐ Staying the same ☐ Slipping

WHAT IS MISSING HERE

Social life

Look at: People you admire and learn from · new friends in the area where you want to excel · healthy relationships

Ask: Does my circle give me energy or drain it? Do my relationships make me happy and proud?

THE YEAR BEFORE LAST

LAST YEAR

THIS YEAR

Over these 3 years, this area is: ☐ Progressing ☐ Staying the same ☐ Slipping

WHAT IS MISSING HERE

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Find What Still Matters

From your look-back, list what is still missing: the things you wanted to have or achieve over the last three years but didn't. For each one, ask whether it still matters to you today, and why. It is perfectly fine to let some goals go.

	WHAT IS MISSING	AREA	STILL MATTERS?	WHY IT MATTERS TO ME TODAY	HOW MUCH I CARE (1–5)
1			☐ Yes ☐ No		
2			☐ Yes ☐ No		
3			☐ Yes ☐ No		
4			☐ Yes ☐ No		
5			☐ Yes ☐ No		
6			☐ Yes ☐ No		
7			☐ Yes ☐ No		
8			☐ Yes ☐ No		
9			☐ Yes ☐ No		
10			☐ Yes ☐ No		

A goal that carries real emotional weight keeps you coming back to your plan, even on hard days. A goal you only think you *should* want tends to fade quickly.

Rank the four areas

Rank them by how much you want to improve each one and how deeply you care about it.

1ST

2ND

3RD

4TH

MY MAIN AREA THIS YEAR

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Your Vision and Big Goal

My 3-year vision

Start from what is still missing and still matters most, especially what you feel strongly about. Where do you want your main area to be in three years?

Dream without limits

Don't let your present situation decide the size of your goal. If you start from your current limits, the goal is likely to be too small to excite you. Before you decide, read book summaries, listen to podcasts and learn about people who did something big in this area.

WHAT I READ, HEARD OR LEARNT

My big goal

Write it clearly, with all its details, and describe how you will feel when you reach it. Write it a few times with small changes, then tick the version that is clearest and closest to your vision.

- [ ] VERSION 1
- [ ] VERSION 2
- [ ] VERSION 3

Before you finalise it

- [ ] I can explain it to someone in my family, even a teenager, and they can picture what it looks like and how it feels.
- [ ] It fits my family's vision. We have talked it through.

MY FINAL BIG GOAL

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Milestones and Actions

Milestones

Think of each milestone as a smaller version of your big goal. Plan them so that you can reach one or more within the coming year, and celebrate each one you reach.

MILESTONE	TARGET DATE	HOW I'LL CELEBRATE

Actions for my first milestone

Plan three actions for your main area. Define each one very clearly: what you will do, how much time or quantity it involves, and how often you will do it.

WHAT EXACTLY I WILL DO	HOW MUCH / HOW LONG	HOW OFTEN

One action in each of the other three areas

Bigger growth comes when every part of your life supports it. Even one small action in each area keeps your whole life moving forward together.

AREA	ACTION	HOW OFTEN

That makes six actions in all: three for your main area and one for each of the other three areas. A few thoughtfully planned actions, aligned with your milestone and your big goal, are easier to follow than many.

Actions with my family

Choose some of your six actions to do with your partner, spouse or kids. They become your partners in the plan and can remind and encourage you.

WHICH ACTIONS, AND WITH WHOM

Keep your big goal private, apart from your family. Share only the actions you have started taking, and only when someone asks.

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Monthly Action Tracker

MONTH

Write your six planned actions down the left: three for your main area and one for each of the other three areas. At the end of each day, tick every action you completed. Keep this page where you see it every day, but your guests won't.

ACTION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
MAIN AREA	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
MAIN AREA	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
MAIN AREA	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
OTHER AREA	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
OTHER AREA	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
OTHER AREA	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Notes for this month

What helped, what got in the way, and any milestone you reached.

Print this page once for each month, or save a new copy of the file each month if you fill it in on screen. Those daily ticks become a visible record of your progress.

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Quarterly Review

Every three months, sit down and review your plan. Check whether you followed all your actions or missed some, and see how far you have come toward your milestone.

> Keep your planned actions unchanged until the six-month review. Actions need time to create results, so it is too early to judge them at the first review. After six months, refine any action that needs changing. When you reach a milestone, celebrate the win, then plan the actions for your next milestone.

Quarter 1

REVIEW DATE

WHICH ACTIONS DID I FOLLOW, AND WHICH DID I MISS?

HOW CLOSE AM I TO MY MILESTONE?

Quarter 2

REVIEW DATE

WHICH ACTIONS DID I FOLLOW, AND WHICH DID I MISS?

HOW CLOSE AM I TO MY MILESTONE?

Quarter 3

REVIEW DATE

WHICH ACTIONS DID I FOLLOW, AND WHICH DID I MISS?

HOW CLOSE AM I TO MY MILESTONE?

Quarter 4

REVIEW DATE

WHICH ACTIONS DID I FOLLOW, AND WHICH DID I MISS?

HOW CLOSE AM I TO MY MILESTONE?

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Example: A Filled-In Plan

Here is how the plan might look for someone whose main area is finance.

MAIN AREA THIS YEAR

Finance

WHAT IS MISSING (AND STILL MATTERS)

I earn well but save very little. My spending follows my mood.

MY FINAL BIG GOAL

In three years, I have a full year of living expenses saved in a separate account. I pay every bill without checking my balance first, and I feel calm and in control whenever I think about money.

Milestones

MILESTONE	TARGET DATE	HOW I'LL CELEBRATE
One month of living expenses saved	By spring	Dinner out with the family
Three months of living expenses saved	By the end of the year	A weekend trip together

Actions for my first milestone

WHAT EXACTLY I WILL DO	HOW MUCH / HOW LONG	HOW OFTEN
Move money into my savings account	$300	On the 1st of every month
Cut 3 unnecessary expenses from my monthly spending and move that money into savings	3 expenses	Check at each month-end
Money check-in with my partner	30 minutes	First Sunday of the month

One action in each of the other three areas

AREA	ACTION	HOW OFTEN
Personal	Strength training for 30 minutes	3 times a week
Professional	Read one book summary in my field	Every week
Social	Meet or call one person I admire and learn from	Twice a month

Actions with my family

The monthly money check-in, done together with my partner.

Read the full method in **New Year Resolutions You'll Keep: A 10-Step Plan** on scriptifysuccess.com.

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