



## WORKBOOK

"The reason most people never reach their goals is that they don't define them, or ever seriously consider them as believable or achievable. Winners can tell you exactly where they are going, what they plan to do along the way, and who will be sharing the adventure with them." ~ Denis Watley



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## **Example Outcome of 1-Page Template - a Business Coach**

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### ***Theme for the Year - 2016 is the Year of...***

Standing in my Power and Being Unstoppable

### ***Best Practices***

- Boldly and Fearlessly Ask For What I Want
- Follow Up and Follow Thru with Focused Action
- Remember It's All About Making A Difference And The Client Experience

### ***Intentions for 2016 (some example statements)***

- I am a nationally known transformation coach and leader. I have a clear, engaging, authentic message and voice that people are drawn to. I use it in all of my communications, talks, blog posts and social media.
- Our community is over 10,000 people with our list, program members, and social media following that are responsive and engaged in what we have to offer. I work with 1,000 people through my programs, events and products. I speak monthly to groups of over 100 people.
- I partner with well known bloggers and industry leaders to cross promote and support one another. The business is profitable and financially supporting me to live the life I truly desire and we exceed \$500,000.

### ***Top Goals***

#### ***Sales & Marketing***

- Grow list and community to 10,000+ people & work with 1000 clients
- Attend at least 1 event per week - networking, collaborating, learning.

#### ***Financial***

- Revenue \$500,000+.
- Pay Down Debt to \$1000 at any given time.

#### ***Services/Product Development***

- Develop 3 Evergreen Signature Programs
- Deliver One Live Event

#### ***Admin/Office/Technology***

- Hire VA and Marketing Manager
- Put Metrics & Reporting Systems in Place

#### ***Balance***

- Take 12 weeks off during the year
- Able to spend time with kids after school

## **Snapshot of Last Year - Your Successes**

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*Looking back at last year, what were your successes?*

As you review your list of successes, notice what you have gotten better at...and add that.

**NOTICING:** *What did you notice after completing this list?*

**SURPRISES:** *What most surprised you?*

**FEELINGS:** *How do you feel when you look at this list?*

**CELEBRATION:** *How many things on the list do you remember celebrating or stopping to acknowledge in yourself?*

Take a moment to come up with an action around celebration and include in your Learning & Action Journal

**SO, WHAT?** *Why is this important anyways??*

## **Snapshot of Last Year - Shortfallings**

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*"Experience is what you get when you don't get what you want." ~ Unknown*

***What were your biggest shortfallings from the last year?***

***Shortfallings can show up in many ways...***

- Regret
- Disappointment & Lost Hope
- Other's disappointment in you
- Unfulfilled Dreams
- Thwarted Expectations

***This is the time to be honest with yourself***

- What we hide from ourselves will ultimately run us
- What we resist, persists

***BEING AUTHENTIC: As you review your list, does it reflect what you experienced? If not, what's missing?***

***SO, WHAT? Why is this important?***

- Acknowledging disappointments can free us up to focus on what is important
- Being honest with ourselves has us regain our power

***WHAT TO DO: What do we do about our shortfallings? Either...***

- Accept them
- Let them go
- Learn & Grow

***YOU CHOOSE: What do you want to bring into this coming year? You have a choice!***

## Learning & Insight

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*Reflecting back over last year, what insights did you gain?*

Review your lessons learned and complete the following exercise.

### **EXERCISE** - Individual - Top 3 Best Practices

Think about the changes you most want to make this year in your business. Which lessons could contribute most to you having the business you want this year? Choose the top 3 that can make the most difference in having a successful and thriving business and write them in the box below. **Update the "Business Goals" Template at the end of the packet.**

#### *Best Practices*

1.

2.

3.

**LOOK AT WHAT'S POSSIBLE:** Imagine for a moment what your business would be like if you followed these best practices. What would be possible for you? For others? Write any insights below.

## **Goal Setting Process: Visualization**

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Sit back and relax and when the visualization is completed, jot down as much as you remember. Do not worry if you forgot something. Trust that you will remember exactly what you need to.

## **Goal Setting Process: Visualization Notes**

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1. What are the greatest accomplishments you most remember?
2. What was the biggest impact you made?
3. What measurable difference do you see ...in yourself. In others?
4. Which area did you have the greatest breakthrough in?
5. What issue did you finally put behind you? And, how does it feel?
6. Looking back, what did you most learn?
7. What were you most surprised about?
8. What is it that put the biggest grin on your face?



9. What noticeable difference did you see in your business?

10. What are people saying about you and your business?

11. If you had to sum up the year in a nutshell, what was the year about for you?

## **Identify Theme for the Year**

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### ***Definition - What is a Theme?***

- Your ultimate agenda for the year – something you can always return to that helps keep you focused
- What you ultimately want your year to be about – “2016 is the year of....”

### ***Characteristics of a Theme - Short & Simple***

- It is broad, but clear
- It reflects something you want to pay attention to this coming year
- When you refer to it, you know exactly what it means
- It calls to you – it is compelling!
- At any given time, you know whether you are on track or not

### ***Why create a Theme?***

- Hold a context for the year
- Way to simplify and easily remember what is important – this provides a greater probability of success

### ***Is my Theme the only thing I can concentrate on this year?***

- It's not the only thing, but should be broad enough to apply to multiple areas of your business

### ***Examples of a Theme for the Year - "2016 is the year of ...."***

- Growth & Development
- Foundation & Infrastructure
- Valuing my worth – making more & working less
- Standing in my power
- Increasing wealth & abundance
- Sustaining and Maintaining
- Being Internationally known
- Getting Back to Basics
- Making a Difference

### ***Creating your Theme***

There are many ways to identify a theme for the year. Pick a question below to stimulate your thoughts. If you are not getting any movement, pick another question!

1. When you think about the achievements you had in the visualization and you think about what you would like to achieve in your business this year, what are the most critical areas or challenges that stand out for you?
2. What do you want to highlight or put an emphasis on this year? Where do you want to take your business?
3. Look back at your notes from the visualization, what was the year about for you? What does this year feel like for your business?
4. What is your business moving into or moving out of this coming year?
5. What do you most remember that stands out as a thread through the year? If you were to sum up the year, what would be the common theme? Fill in the blank "2016 is the year of..."

### **Validate your Theme:**

- Repeat the statement, and notice your energy level. How does it feel?
- Does it energize you? Is it juicy? Is it compelling?
- Could you repeat it to someone you bumped into on the street?

***2016 IS THE YEAR OF...***

**Write your Theme for the Year into the "Business Goals " Template at the end of the document.**

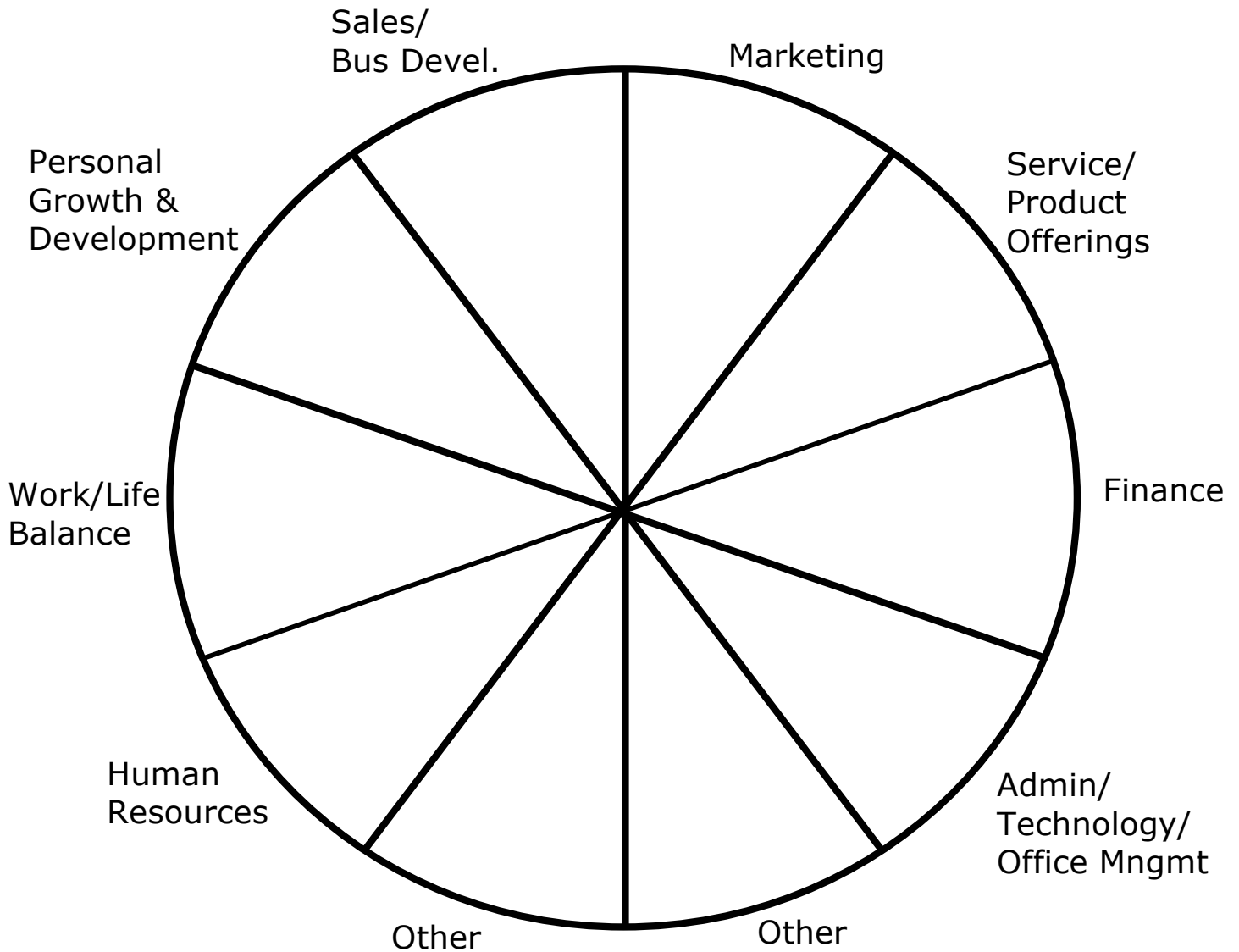
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## Goal Setting Overview

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### *Goal Setting Process*

1. Identify Logical Areas of your business
2. Start with the end in mind - Define results you want to achieve in your business and set clear intentions
3. Create specific goals based on the results you want to achieve
4. Validate goals – S.M.A.R.T. & Believable
5. Address Barriers
6. Define Accountability and Support
7. Break goals into action plans



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## **Goal Setting Process: Set Your Intentions**

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*Intention - A desired result, statement of purpose.*

### **My Business**

**I am nationally known as a transformational leader.**

**I have articles published in well-known magazines and publications.**

**I am financially independent**

**I have widely known and sought out workshops that deliver long-lasting results to clients.**

**I impact over 1000 people and make a profound difference in their work and life.**

**I serve powerful, successful coaching clients who are a joy to work with.**

**I partner with talented, fabulous people and have mentors who enlighten and support me.**

**People come to me solely based on referrals. I no longer need to market my work.**

**There is a steady stream of coaching, consulting and speaking work and a perfect balance that allows me to enjoy and appreciate other areas of my life with ease and aliveness.**

**I am energized, motivated and fully supported in my work.**

1. Imagine that you have achieved everything you ever wanted in your business this year...
  - o What would the end result look like? What results would you see?
  - o What would you do? (I do...)
  - o What would you have? (I have...)
  - o Who would you be? (I am...)
  - o How would you feel? (I feel...)
  - o Who and what impact would you make?
  
2. Refer back to your visualization and logical areas on next page to stimulate thought.

YOUR INTENTIONS:

## Tips on Setting intentions

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*"Many of us spend half our time wishing for things we could have if we didn't spend half our time wishing."*  
~Alexander Wolcott

- Stay in present tense ("I am...I have...I do...I make...I feel...")
- Stay away from "I will..I want....". It only creates willing and wanting, and not that which gives you fulfillment
- Capture the experience – the essence and feeling of it – as if you could put yourself there and experience it
- Keep it clear, detailed and to the point
- Expand and further define words that are ambiguous or lead to misinterpretation (e.g. more, greater, less, many, several)
- Stay away from comparisons (e.g. I have published 2 more books than I have today.....I am more patient than I am today)
- You know you have the right words when your energy is high and you feel alive when you speak it (and remember that it is natural to have anxiety and fear – other signs of aliveness)

## Components of a Goal – S.M.A.R.T.

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**S**pecific

**M**easurable

**A**ttainable

**R**ealistic

**T**ime-bound

### *Different ways to measure a goal (Qualitative & Quantitative):*

- With concrete numbers (workout 3x/week)
- By a particular feeling (I feel energized when I wake up)
- Documenting information (Rate on scale of 1-10 each night)
- Impact you have (results you may see from someone/something else)

### *What Drives Your Goals?*

- **Other People/Circumstances?** In the last year, did you pursue goals aligned with who YOU are, or were they goals someone else wanted you to achieve?
- **Need to "Look Good"?** Did you accomplish things out of wanting to "look good" or to prove yourself to others you are good enough? Or was the driver coming from genuine desire and utilizing your true gifts?

***Create Goals***

1. Based on your intentions above and goals you have already defined from your prep work, what specific goals would you need to achieve to have your intentions come true?
2. Remember to keep goals SMART (Specific, Measurable, Attainable, Realistic and Time-bound). (e.g. Book 4 appointments per week, Recruit 3 people per month, or Build a self-sufficient Team, Be more patient and trusting, Maintain Life Balance - Take 1 evening/week for myself and 1 weekend evening for a date with my husband).

**Business Goals**

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**Goal 1:**

**Goal 2:**

**Goal 3:**

**Goal 4:**

**Goal 5:**

**Goal 6:**

**Goal 7:**

## **Validate Goals**

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*Review each goal (with a partner/colleague or alone), ask ...*

1. Is the goal measurable?
2. Are you really going to do this? If not, what ARE you going to do?
3. Will you take responsibility for accomplishing this goal?
4. Is this goal coming from your genuine desire to utilize your gifts or from the need to "look good"?
5. Update goals appropriately.

*Translate goals into Goal Template by Area*

## **Wrap-up**

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### **Key Learnings**

- Acknowledge your accomplishments – Celebrate!
- Utilize your shortcomings to better understand your limitations
- Defining a theme for the year and focus ways of being sets you up for success
- Keep your goals simple, measurable and related to what you really want – stick to up to 7 overall goals
- Request the support you need and set up necessary structures
- Keep it fun and engaging for you!

**Continue to LEARN! LEARN! LEARN!**



**Business Goals**

**Name:**

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*Theme for the Year - 2016 is the Year of...*

***Best Practices***

- 
- 
- 

***Intentions for 2016***

***Top 5-7 Goals***

**Area 1:**

- 
- 

**Area 2:**

- 
- 

**Area 3:**

- 
- 

**Area 4:**

- 
-