



Online Free Resources

We develop people – they develop your business

Personal & Business Goals

A top-level strategic tool.

This form has been designed to make it easier for you to prompt your clients into giving you their true goals. They may be goals the clients have never said to anyone else before – they may even be goals the clients have never admitted to themselves.

The form separates personal and business goals, although in practice we often find that the two are often so bound up together that they become the same thing. But please stick with the headings – they'll help you keep a balance and will act as prompts to get the client to open up.

Record the individual client's goals and ambitions by filling in the form. Probably best to do so when you are getting them to open up about what they really want out of life. Get them to dig deep and tell you about their innermost dreams and objectives.

Write a description of the goal as your client expresses it to you. The easier objectives to pinpoint tend to be the "big" ones – enough money to enable a choice of career, business and lifestyle, a big enough house – and you should be able to get them fairly quickly. The power of this form lies in how it is then able to go further, to get clients to look beyond the obvious goals and ask themselves what they *really* want. They might preface it with a qualifying statement such as "What I would really like to do, although I know there's no chance of it ever happening, is..." That's when it starts to get interesting and useful for both the client and you, and when you can start to talk about what their potential could be.

Use the "No." column to number each item and feel free to use more than one line for any individual goal, if necessary. Use the "By When" column only if a particular timescale emerges as part of the discovery process. Focusing on getting timescales for each goal at this stage of the process can sometimes pre-empt and get in the way of the action plan, which only comes later in the process.

Use the SMART prompt at the top if you need to, but don't let it get in the way of identifying your client's goals.



- S** - Specific
- M** - Measurable
- A** - Achievable
- R** - Realistic
- T** - Time Related

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PERSONAL GOALS

Consider **ALL** your **Personal Goals** for the next five years

No	Goal	By When

BUSINESS GOALS

Consider **ALL** your **Business Goals** for the next five years

No	Goal	By When