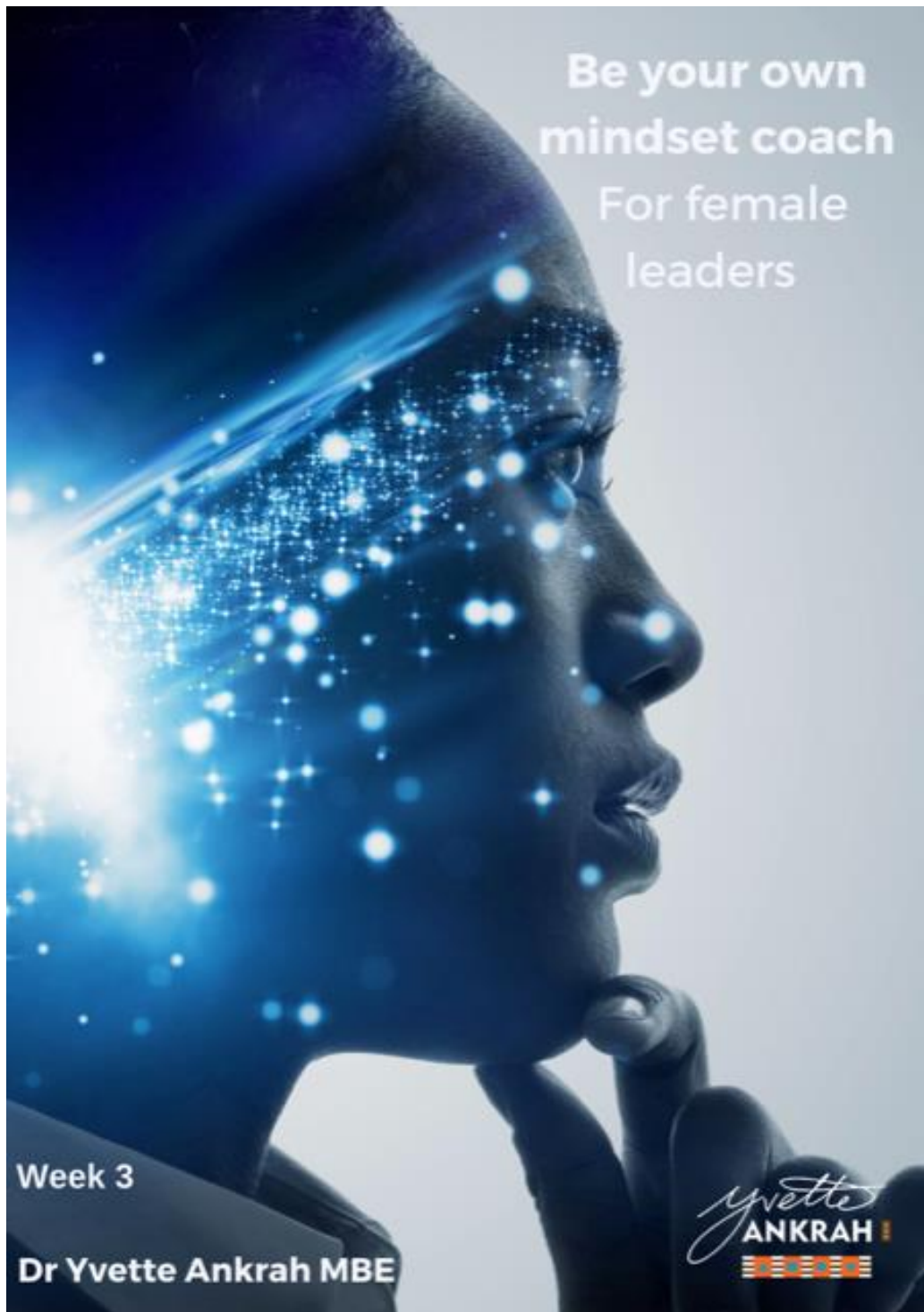




Week 3

What do you want – visioning, financial, personal goals



Be Your Own Mindset Coach

Week Three

What do you want? Visioning, financial and personal goals

This week is all about creating a vision of what you want for yourself and setting those financial and personal goals.

In week two we looked at your strengths, how you can use them to problem solve and address your opportunities for the future.

Expressing the vision for yourself and your business is crucial so that you can start setting goals. Listen to the audio and complete the first vision exercise – it will help you identify your 'why' and enable you to start working towards what you want.

We will outline your goals this week and next week you will be setting two deep goals and these will be what you will be working on as part of your 90-day plan.

By the end of this section, you will have a better insight into what you want, have a clear vision, created outline goals and be ready to move deeper next week.



VISION

Why do you need a powerful vision?

- Help you to see your big 'why' - this is all about your purpose and the reason you have chosen to do what you do.
- Is the first step to goal creation
- Provides focus when creating your strategies
- A vision can help set goals to move your business forward.
- A strong vision enables strategic plans to be given boundaries as there is a guiding principle or ideal.
- A vision can motivate employees as well as yourself - helping decision making at work.
- A vision can express the businesses reason for existence. Your vision can take hold of people and then bring them onside.
- An effective and strong vision will help employees and stakeholders commit themselves to the goals and the values of the business.



VISUALISATION EXERCISE - WORKSHEET

Listen to the audio and then answer the questions:

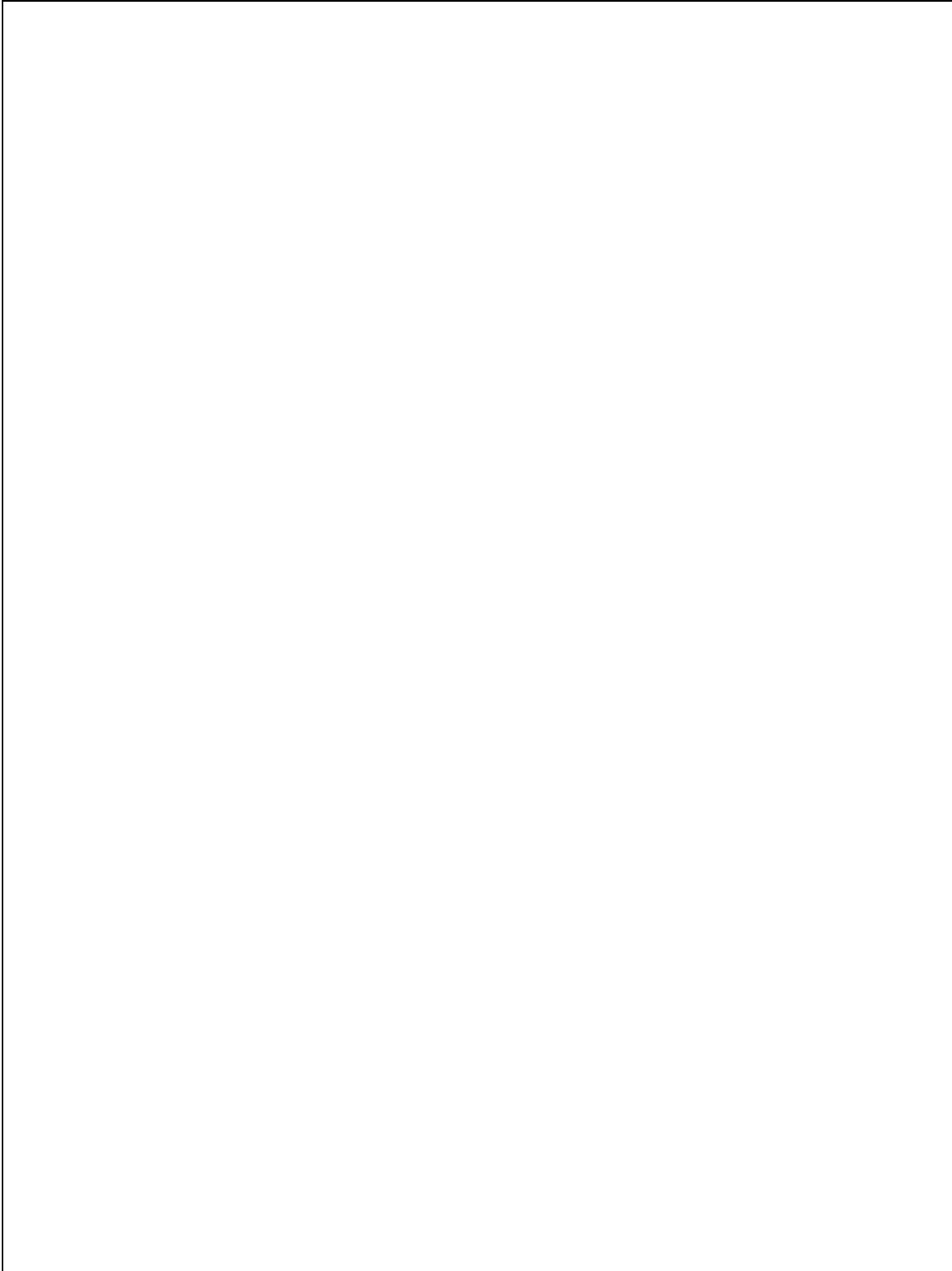
Five years in the future - imagine your perfect day

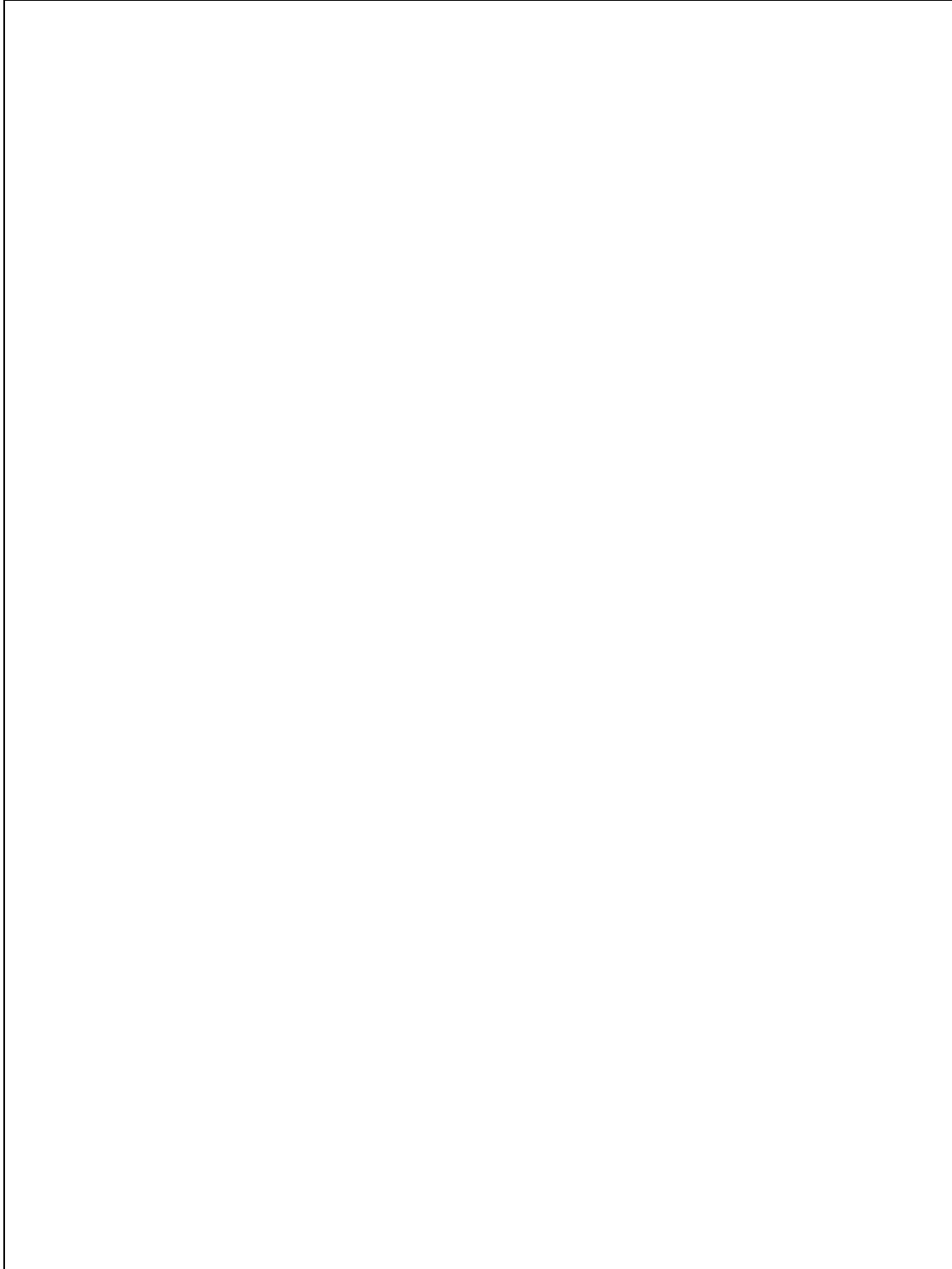
Think about

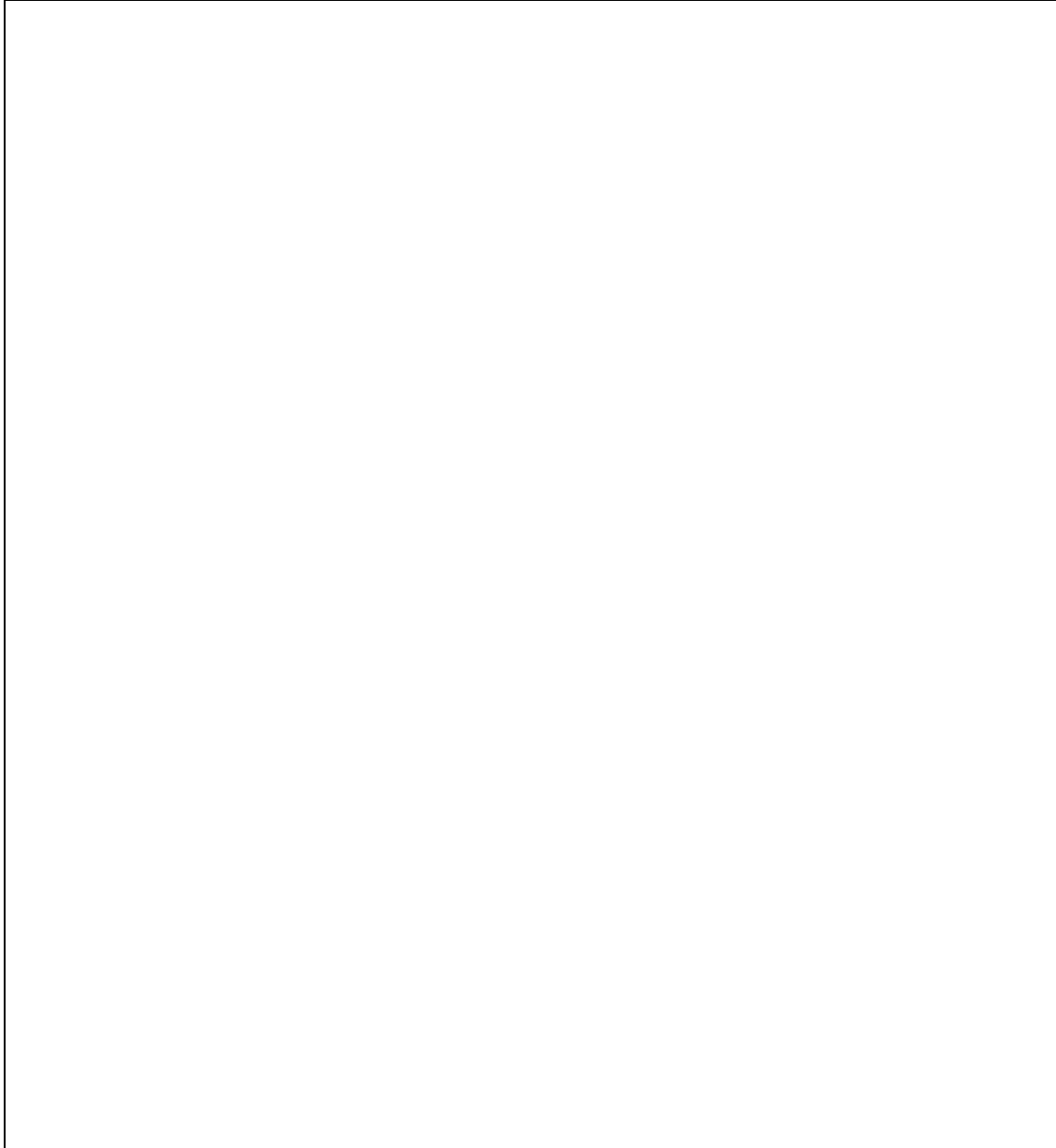
- What you saw
- What you heard
- How you felt

In your perfect day.

1. Where do you live?
2. What things would you own?
3. What would you do for work or fun?
4. Who would you help?
5. What would you do with your time?
6. Who would you spend time with?









BE, DO, HAVE – EMBODYING YOUR FUTURE

Now you have an outline of what's important to you and what you want in your life in the next five years. This exercise helps you think about *how* you will create your vision and stop thinking about *when* you will create your vision.

It is about embodying who you wish to be, now in the present, to create that version of you that you saw, heard and/or felt in the meditation exercise.

How we block our future

HAVE, DO, BE

The focus is often on the problem and the belief is if you solve the problem then you have what you want and become who you would like to be. This model stops you from taking action and moving forward.

Example - When I have the time, I will start consistently marketing my business and reach more customers who need my services/products.

DO, HAVE, BE

The focus here is on constantly doing, with the idea that the more you do, the more you will have and are happier and more fulfilled you will be. This model needs to stress and burnout.

Example – I'm going to post on social media 20 times a day, attend every event so that I am everywhere and can reach all those customers out there.

How we create our future

BE, DO, HAVE

Learning to focus on who you want to be, enables you to create a life with your 'why' and purpose at the heart. It also enables you to create something sustainable and enjoyable.

Example - I am a successful business owner, therefore I block out the time to create and implement a marketing plan that supports my business goals and my lifestyle, so I can help reach the right customers.



Be

You've already been working on this by looking at your values, your strengths and by doing the deeper vision exercise you have looked at the future you wants. All these exercises have been designed to help you formulate (or clarify) your 'why'.

You also know what is possible for you to achieve and you've done this by looking at what you have done and how you did it. Now you need to move forward into that vision of the future and ask yourself - Who do I want to be?

- I want to be happy every day in my work
- I want to help others connect and fulfil their purpose
- I want to be free financially and never worry about money

By focusing on who you want to be in the future, you can make changes now to make that happen. You are modelling your future self.

Do

This is all about taking action and making decisions.

What do you think you need to do to realise your vision? If you are embodying that version of yourself, what decisions would you make and what actions would you take?

- I want to work smarter not harder
- I want to get a virtual assistant to take away all my administration
- I want to streamline my systems, so I spend more time with my clients
- I want to develop staff so I can take a step back

Have

This is about outcomes and the things you want to see – whether it is a feeling or something tangible. If you want to have a business that is remote write that down, if you want to sell your business, franchise it or have a completely different way of generating income, list that in the 'have' section.

- I want to make £xk per month
- I want to have achieved my next qualification by August
- I want to have two family holidays this year
- I want to feel less stress and be able to relax each evening

Using the Be, Do, Have model enables you to start breaking your wider vision into smaller goals.



Use this template to help you break down your goals. Include business and personal goals and state a financial goal. Think about what you'd like to achieve over 12 months. Use the examples above to help you.

When you completed the exercise reflect on your five-year goal. Are the steps outlined below in line with that vision?

Be	Do	Have



ANCHORING YOUR FUTURE STATE

Anchoring is the process where you connect to a feeling. This is useful and powerful and can help you in many situations. You've already spent some time thinking and/or feeling how you wish to be.

This exercise takes you back into that space and enables you to connect to the sensations you had in the future.

This will help you to be in that state when you action your goals.

What three states or emotions will help you create the future you desire?

e.g. calm, happy, determined, excited

1.

2.

3.

Listen to the audio exercise and follow the instructions.



SETTING SMART GOALS – READING FOR WEEK 4

*Where will you be in 12 months? Will you be living the life of your dreams?
Or will you be just another year older?"*

SMART Goals and objectives

You created some outline goals and next week we will go deeper and set two deep goals that you will work on as part of your 90-day plan. You'll be writing those goals as SMART goals.

Specific

Measurable

Achievable

Realistic

Time-bound

(there are various versions of this, but I've always liked this one!)

Specific – The six W's

- **Who:** Who is involved?
- **What:** What do I want to accomplish?
- **Where:** Identify a location.
- **When:** Establish a time frame.
- **Which:** Identify requirements and constraints.
- **Why:** Specific reasons, purpose or benefits of accomplishing the goal

Measurable – what will be the outcome? How will you measure success?

Achievable – is this goal attainable?

Realistic – can this be achieved with the resources you have available?

Time-bound – when do you want to achieve this goal?

By looking at objectives in this way you can plan a step-by-step way to succeed as you will not set yourself up to fail.



10 STEPS TO SETTING SMART OBJECTIVES¹

1. Sort out the difference between objectives and aims, goals and/or targets before you start. Aims and goals etc. relate to your aspirations, objectives are your battle-plan. Set as many objectives as you need for success.
2. SMART stands for Specific, Measurable, Achievable, Realistic and Timely.
3. Don't try to use that order M-A/R-S-T is often the best way to write objectives.
4. Measurable is the most important consideration. You will know that you've achieved your objective because here is the evidence. I will know too! Make sure you state how you will record your success.
5. Achievable is linked to measurable. Usually, there's no point in starting a job you know you can't finish or one where you can't tell if/when you've finished it. How can I decide if it's achievable?
 - you know it's measurable
 - others have done it successfully (before you, or somewhere else)
 - it's theoretically possible (i.e. clearly not 'not achievable')
 - you have the necessary resources or at least a realistic chance of getting them you've assessed the limitations.
6. If it's achievable, it may not be realistic. If it isn't realistic, it's not achievable. You need to know:
 - who's going to do it?
 - do they have (or can they get) the skills to do a good job?
 - where's the money coming from?
 - who carries the can?Realistic is about human resources/time/money/opportunity.
7. The main reason it's achievable but not realistic is that it's not a high priority. Often something else needs to be done first before you'll succeed. If so, set up two (or more) objectives in priority order.
8. The devil is in the specific detail. You will know your objective is specific enough if:
 - everyone who's involved knows that it includes them specifically
 - everyone involved can understand it

¹ Reference: Written by the National Primary and Care Trust



- your objective is free from jargon
- you've defined all your terms
- you've used only appropriate language.

9. Timely means setting deadlines. You must include one, otherwise, your objective isn't measurable. But your deadlines must be realistic, or the task isn't achievable. T must be M, and R, and S without these your objective can't be a top priority.

10. It is worth this effort! You'll know you've done your job well, and so will others.

Remember...

Set yourself realistic deadlines. If you're running a business alongside a current job, caring for family members or with little funds some things may take longer to implement.

Set out your tasks and do a little each day – it's the steps you take every day that will make the difference.

I would recommend having no more three key things each day you want to make happen. Long lists can be demoralising if you are not ticking off lots of items.

Make the most of technology – Smartphones, laptops and tablets mean you can work more it didn't or less anywhere. You can save information in cloud storage for ease of access and use a variety of apps to assist you.

Remember to celebrate your achievements – don't keep it to yourself - make sure you let everyone know!