

Annual Goals Review



Every successful individual or organization has a plan. You need to know where you are today and what you want to accomplish in the future. However, just knowing what you want to accomplish is only the first component of a successful equation. The balance of a successful life is achieved by developing the specific plan and action steps necessary to accomplish that plan.

The Annual Goals Review will facilitate you through a process to help identify and prioritize your defined measurements for success and help you develop a specific plan of action through questionnaires, assessments, and goal achievement.

Setting clear goals for the things you want to accomplish in your organization and also in your personal life, creates a positive balance. There are no roads to “nowhere.” Achieving your purpose and your passion can be a reality!

The Process

The Annual Goals Review is a structured, dynamic approach to goal achievement and personal success. This unique process allows you to crystallize those things that are important to you in both your organization and in your personal life, which helps you to define the plan to see those things come to fruition.

Organizational Elements

- Definition of Vision and Values
- Organizational Assessments
- Organizational Goal Definition
- Planning and Accomplishment

Personal Elements

- Dream Inventory
- Personal Assessments
- Personal Goal Definition
- Planning and Accomplishment

The form is a structured template for goal setting. It includes sections for:
1. GOAL (with a sub-section for TARGET DATE)
2. AFFIRMATIONS
3. REWARDS
4. CONSEQUENCES
Below these are four identical rows, each containing:
- POSSIBLE SOLUTIONS TO CONSIDER
- NECESSARY ACTION STEPS
- DATE
- DELEGATED TO
Arrows indicate a flow from the goal section down to the first row, and then horizontally across the row.

“This unique process allows you to crystallize those things that are important to you in both your organization and in your personal life ...”



Applied executive brilliance in the style of the intrepid sea captain

Achieve more! Work Less! Celebrate Often!

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