

Administrative Professionals Goal Setting Guide and Template

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Administrative Professionals - Goal Setting Guide and Template

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Setting goals is the first step in turning the invisible into the visible.
Tony Robbins

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The Five Phases of Goal Setting and Accomplishment

The fact that you are even reading this guide indicates there is a desire to make a change in your life. The sole purpose of this guide is to illustrate how to capture, identify and manage your goals in order to be successful. Like everything else we do in our administrative professional's role, we create a process, get organized and develop a workflow that we can adjust along the way. Above all, we need to remember to keep it simple so as not to overwhelm ourselves with details.

Phase One: Reflection

Developing a goal or a set of goals starts with reflecting on what you want to change, improve or aspire to. Take the time to list the areas of improvement, whether personal or work goals, that will impact you immediately or long term. Some goals can be simple and take only a few minutes to conceptualize, while others may take a bit longer to consider. Don't worry about the details here, just create the goal and write it down. Later in the process you will define the goal and actions necessary to successfully accomplish your objective.

> [Example] Goal setting requires listing goals you want to accomplish. Like speed dating, write down in 90 seconds or less the top goals you might want to accomplish short or long term, and one more idea, break your goal wish list into personal and business sections:
> **Personal**
>
> - Lose 10 pounds
> - Vacation in Maui
> - Visit family
> - Buy a home
>
> **Business**
>
> - Get a pay raise
> - Get a promotion
> - Work better with my boss
> - Find a new job

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Phase Two: Process and Collect

In this stage of goal setting, review your goals and break them into two buckets – short or long term. For our long term example, the goal can be accomplished in a year's time. The personal goal of losing 10 pounds, would be considered short term as it can be accomplished in a few months. Planning a vacation might be considered long term, as it would include longer scheduling times, savings or longer timeline for others to be part of your vacation dream. When thinking in terms of business and your career, say getting a pay raise, you will need to consider if it can be accomplished in a few months or take longer. Working better with your boss or other team members might be considered a short term goal.

Be specific in your goal, give it measurable results, make it realistic to be feasible, and make a list of action items that need to be accomplished in order for you to meet your end goal.

[Example] Write your goal down, then list action steps required to be successful:
Personal - Short Term Goal: Lose 10 pounds by July 2014
Why: I want to lose 10 pounds by July so I look great for our family reunion.

Action Item: Eat healthier (good answer but you need to be specific) i.e. eat healthier and see my doctor or dietitian for menu ideas. Set an appointment next week by (date/time).

Action Item: Join a weight loss program (again, good answer but be more specific) i.e. join Weight Watchers by next week (date) and start immediately.

Action Item: Starting today - stop eating after 8 pm (simple action item and easy to accomplish).

Phase Three: Get Organized

Writing down your goals, then getting specific as to what it will take to accomplish those goals should include details that are relevant and measurable. It is also important to be realistic in goal setting, making sure the goal is attainable. Getting a pay increase may seem easy, but if the company has a freeze on pay raises, it might not be attainable in the short term.

In getting organized for success, there are four key action categories you need to include in your goal setting workflow:

- Write out long and short term goals, both personal and business
- Be specific in detailing action items needed to attain each goal
- Make sure the action items are measureable, i.e. meeting a time/date; specific number (x pounds per week), other action items etc.
- Make your goals visible, place them on your calendar, on your desk, and/or post them on your wall, or any place that will be in constant view.

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PHASE FOUR: REVIEW

You have your primary goals listed, you've outlined your action items, you've set your calendar for the date you want your goals accomplished by, and now it is time to review. Some goals will be easier than others to attain – that's life. What we want to insure is the goal or goals you have chosen will be successfully completed.

One stumbling block in goal development is understanding what surrounds your goal, and making a decision if the goal you've listed for yourself is really attainable. Though we intended this goal planning template to be simple, easy and quick to develop for yourself, some goals just take more time to understand what is in your control and what is not. Certainly, decision making can be hard and understanding what the "right choice" is can be made simpler by developing an "A" / "B" list.

[Example] Look for a new job or make my job better as a goal:

A/B list development is meant to be a guide in helping you make rational and objective analysis of your current situation. When you have completed listing your status quo – good and bad, review the list and see what **steps you can take to improve your circumstances assuring goal success**. Remember, you are in control of your destiny and realizing the "grass isn't always greener" at the new job – perhaps there are alternative positive changes that can be made where you are at. Making changes requires good knowledge and information to make the right choice.

"A" list are the positives for staying at your job or deciding whether to move on. Here, list what best fits your situation i.e.

- I enjoy working with my executive
- I like the team I work with
- I enjoy a good balance of work and personal life

"B" list are the negatives you face daily at your job and most likely will make you want to look for a job change. Here, list what best fits your situation i.e.

- I'm dissatisfied with my current position
- I can't advance my career here
- I'm not recognized for my talents
- My work and personal life balance is not right
- I'm always stressed at work
- My executive is terrible to work with

Next step -- what to do with this analysis of your current situation? Let's focus on the "B" list, highlighting some items that can be in your control. If "I'm dissatisfied with my current position" is the primary reason to look for a new job; yet your "A" list has a number of items that you like; stop and ask yourself what will make you happy to stay where you are?

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If your primary reason for looking for a new job is "my executive is terrible to work with," and he isn't going to change, yet you really like the company; set a goal to figure out how to work better with him/her, or set a plan to move internally within the company. Sometimes, seeking out information and gaining knowledge can help you deal with difficult people. The workshops that AdminUniverse™ hold can help in such situations.

PHASE FIVE: ALL ABOARD!

For many of us, we are enthusiastic about setting New Year's resolutions and on January 1st we are chockfull of good intentions and its full steam ahead like a steam train heading down the track at 80 miles per hour. Often by January 8th, we're losing steam and not as energetic about those goals; slumping back into our usual comfort zone.

Being a "creature of habit" is hard to break and represents the major reason goals fail in the first few months. Here are three ideas to help you be successful and push yourself out of that comfort zone:

1. Set goals that are attainable, and based on measurable progress. Set your action items for each of your goals with as much detail as necessary to guide you; how much time you have, how much energy you'll need to put into the action item, and set your priorities to reflect the success of your goal.
2. Life is flexible, you should be too! Goals are meant to be a guidepost, a plan of action for you to aspire to the next level. All good plans allow for change and should be revisited and recalibrated to fit what is current. Be flexible by maintaining an action plan that fits your life, and trust your intuition in moment-by-moment decision making.
3. Be consistent and review your goals and action items daily. Make others aware of your goals, and even ask one or more to help by being your coach in meeting your goals. By sharing your aspirations with others, you subliminally are making a commitment to yourself, and along the way you may find a friend who shares in your goal. Being able to help someone else, at the same time as yourself, is a great motivator.

TEMPLATES:

On the following pages find examples of A/B list and Goal template. Copy and paste and customize to fit your needs. Feel free to pass along to your friends.

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Decision Making Helper -- A / B List

How to use this list:

The idea behind listing your likes and dislikes – the good and the bad, is to guide you to an objective and rational decision making process. Get started by creating a document with two columns, and title them A and B. On the A side column – use this for all of the positive or good things, and just the opposite on the B side column.

When you have completed listing your assessments good and bad, review the list and see what **steps you can take to improve your situation**. Remember, you are in control of your destiny and realizing perhaps there are alternative positive changes that can be made, can help in goal development. Good decision making takes knowledge and information to make the right choice.

[Example] ***Find a New Job or Stay Where You Are.*** There are no right or wrong answers and feel free to add to this list.

"A" list are the positives for staying at your job or deciding whether to move on, add what comments best fits your situation:

- I enjoy working with my executive
- I like the team I work with
- I enjoy a good balance of work and personal life
- I am respected for my input
- I make a good income
- I have great PTO and health benefits
- My commute is great
- Other [Add your own here]

"B" list are the negatives you face daily at your job and most likely will make you want to look for a job change, add what best fits your situation:

- I'm dissatisfied with my current position
- I can't advance my career here
- I'm not recognized for my talents
- My work and personal life balance is not right
- I'm always stressed at work
- My executive is terrible to work with
- I'm overlooked for promotions consistently
- I'm under paid and overworked
- The people I work with are uncooperative
- other [add your own here]

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My Primary Goal: [TITLE OF GOAL]

Primary Goal: [Give your goal a title – GET A PROMOTION]

My overall goal is to: [Write out what you want to accomplish – I WANT TO BE PROMOTED TO TITLE OF EXECUTIVE ASSISTANT TO THE VICE PRESIDENT]

My timeline: [Calendar date when you want to accomplish this goal]

How many hours per week can you dedicate to meeting your goal? [List out what works 1 hour? 3 hours? 10 plus hours? What challenge will prevent you from attaining your goal? List the biggest challenges facing you.]

My current situation is: [Summarize your situation – "I need more recognition for my efforts; I need more responsibility; I need further education etc.]

Action Items: [Based on your answers above in current situation, set the number of action items needed to attain your primary goal. Example:

- Additional educational courses focusing on administrative professional training. Look for courses or workshops that can add to my knowledge base.
- Talk with my executive, peers, and company human resources to get their input.
- Get an updated personnel review to help determine areas of improvement expected from my executive or manager.]

NOTE: Once you've completed your primary goal, you will have a list of action items for each goal. Separately, write out each action item, give clear deliverables to each item. Plan the goal; work the goal.

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Decision Making Helper -- A / B List

A SIDE - POSITIVES	B SIDE - NEGATIVES

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My Primary Goal:

Primary Goal:

My overall goal is to:

My timeline:

How many hours per week can you dedicate to meeting your goal?

What challenge will prevent you from attaining your goal?

My current situation is:

Action Items:

1.

2.

3.

4.

5.

NOTES:

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My Action Item:

My Primary Goal:

My Action Item:

My timeline:

How many hours per week can you dedicate to meeting your goal?

What challenge will prevent you from attaining your goal?

My current situation is:

Action Items:

1.

2.

3.

4.

5.

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