

## Goal Setting

**Presenter: Jon Bartos – President and CEO, Jonathan Scott International**

Jon Bartos is a writer, speaker and consultant on all aspects of human capital and achievement. As president and CEO of Jonathan Scott International in Mason, Ohio, he has achieved industry-leading success. He is one of an elite group of executive recruiters who have billed over \$1 million annually. Within a 12-year period he has cashed in over \$11 million in personal production. The office has won over 17 international awards in the MRI Network, including International Billing Manager of the Year and Top 10 SC Office.

### **About This Segment**

Recruiting achieve consistent personal production, Jon has made goal setting the roadmap to success. In his presentation, he'll share what works and what doesn't work. You'll learn how to set REALISTIC goals, what key questions to ask yourself and how to prepare YOUR roadmap to success.

### **Week 1 and 2 Meetings: “Goal Setting” by Jon Bartos**

**If you are reviewing this episode with a team, watch the entire Episode. Have each participant complete (all or part of) the Questions and Goal Setting Worksheet between Week 1 and Week 2's meetings. In Week 2, review as a group and set professional goals and milestones for the upcoming year.**

**Facilitator (begin the video and watch the entire Episode):** Goal setting should be an important aspect in everyone's life. Individuals work to achieve their personal goals - not the goals of just their employers. It is important for your personal goals and those of the company be in alignment to increase the chance of success. Also, if you don't know what you want or where you are going, it makes it difficult to figure out how to get there. The personal scorecard below is a quick snapshot of goals that are important to YOU in different areas of your life. It has been proven, that if you want to really reach your potential in life – goal setting is how to start.

Before we set our goals, however, there are some specific questions we need to ask ourselves. Questions that will put us in the right state of mind - to be able to set very POWERFUL goals with the horsepower behind them to achieve them - in the face of any obstacle. It might sound a little heavy, but trust Jon when he recommends writing these down and spending at least 30 minutes processing your answers.

### **LEVELS OF GOAL SETTING:**

- Level 1: Set a goal
- Level 2: Write the goal down
- Level 3: Have an action plan
- Level 4: Put milestones in place
- Level 5: Establish time frames

#### WHY GOAL SETTING DOESN'T WORK:

- Goals are not written
- Goals are written down, but not revisited until the end of the year
- Goals are vague
- Goals are assigned – they are given to you, versus being your *own individual* goals
- The goal is set too easy, or too difficult
- There is an inability to measure progress and results
- The goal is not one that is truly relevant to you
- The goals don't match your values and beliefs
- The set goals conflict with other goals
- There is no timeframe set with a goal
- There is no strong motivation or “why” to achieve the goals
- There is no personal responsibility associated with the goal
- The cause of the problem is not addressed – instead, the symptom is addressed, which does not solve the *problem*

#### BEFORE SETTING GOALS, EVALUATE:

Is the goal **specific**:

- Specifics help to **focus our efforts** and **clearly define what we are going to do**. Specific is the *what, why, and how*.
- **WHAT** are you going to do? Use action words such as direct, organize, coordinate, lead, develop, plan, build etc.
- **WHY** is this important to do at this time? What do you want to ultimately accomplish?
- **HOW** are you going to do it?
- Ensure the goal you set is very **specific, clear and easy**. Instead of setting a goal to lose weight or be healthier, set a specific goal to lose 1 inch off your waistline or to walk 5 miles at an aerobically challenging pace.

Is the goal **measurable**:

- If you can't *measure* it, you can't *manage* it.
- In the broadest sense, the whole goal statement is a measure for the project; if the goal is accomplished, there is success. However, there are usually several short-term or small measurements that can be built into the goal.
- Choose a goal with measurable progress, so you can see the change occur. How will you see when you reach your goal? Be specific! “*I want to read 3 chapter books of 100 pages on my own before my birthday*” shows the specific target to be measure. “*I want to be a good reader*” is not as measurable.
- Establish concrete criteria for measuring progress towards the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to the continued effort required to reach your goals.

Is the goal **attainable**:

- A goal needs to stretch you slightly so you feel you can attain that goal. For instance, if you aim to lose 20 pounds in one week, we all know that isn't achievable. But setting a goal to lose 1 pound and when you've achieved that, aim to lose a further pound, will keep the goal attainable.
- When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop that attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals.
- If goals are set too far outside of your reach, you probably won't commit to attaining. Although you may start with the best of intentions, the knowledge that it's too much for you means your subconscious will keep reminding you of this, and you will stop from even giving it your best.

Is the goal **realistic**:

- *Realistic* is not a synonym for *easy*. Realistic, in this case, means *doable*.
- Realistic means that the learning curve is not a vertical slope, that the skills needed to do the work are available, and that the project fits with the overall strategy and goals of the organization. A realistic project may push the skills and knowledge of the people working on it but it shouldn't break them.
- The goal needs to be realistic for you and where you are at the moment. A goal of never again eating sweets, cakes, crisps and chocolate may not be realistic for someone who really enjoys these foods. For instance, it may be more realistic to set a goal of eating a piece of fruit each day instead of one sweet item. You can then choose to work towards reducing the amount of sweet products gradually as and when this feels realistic for you.
- Be sure to set goals that you can attain with some effort! Too difficult and you set the stage for failure, but too low sends the message that you aren't very capable.
- **Set the bar high enough for a satisfying achievement!**

Is the goal **timely**:

- Set a timeframe for the goal: for next week, in three months, by fifth grade. Putting an end point on your goal gives you a **clear target** to work towards.
- If you don't set a time, the commitment is too vague. It tends not to happen because you feel you can start at any time. Without a time limit, there's no urgency to start taking action now.
- Time must be **measurable, attainable and realistic**.

## QUESTIONS TO CONSIDER

What were my successes this past year – both personal and professional? \_\_\_\_\_

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What were some of my shortcomings this past year? \_\_\_\_\_

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What three things could I change professionally and personally that would have a significant impact on the upcoming year? \_\_\_\_\_

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What am I *truly* grateful for? \_\_\_\_\_

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What is my “why”? \_\_\_\_\_

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## PERSONAL, PROFESSIONAL, AND FINANCIAL GOALS

List your annual goals, and be as specific as possible. Make sure each goal is SMART - Specific, Measurable, Attainable, Realistic and Timely. Make a list of the goals and under each goal, the methods you will use to reach it.

### **Example:**

1. Lose 25 pounds this year
  - Join a Gym this week!
  - Buy a book on Diet and Metabolism by Jan 1.
  - Start my workouts first week of January.

### **Personal Goals:**

1. \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  
2. \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  
3. \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_

### **Professional Goals:**

1. \_\_\_\_\_
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  - \_\_\_\_\_

2. \_\_\_\_\_
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  - \_\_\_\_\_

3. \_\_\_\_\_
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  - \_\_\_\_\_

**Financial Goals:**

1. \_\_\_\_\_
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  - \_\_\_\_\_

2. \_\_\_\_\_
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  - \_\_\_\_\_

3. \_\_\_\_\_
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  - \_\_\_\_\_

**Health Goals:**

1. \_\_\_\_\_
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  - \_\_\_\_\_

2. \_\_\_\_\_
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  - \_\_\_\_\_
  - \_\_\_\_\_

3. \_\_\_\_\_
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  - \_\_\_\_\_
  - \_\_\_\_\_

**Other Important Annual Goals:**

1. \_\_\_\_\_
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  - \_\_\_\_\_

2. \_\_\_\_\_
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  - \_\_\_\_\_
  - \_\_\_\_\_

3. \_\_\_\_\_
- \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_

**Personal Vision Statement:**

**Personal Responsibility and Accountability Statement:**

## ANNUAL PLAN

Define your specific *goals* and *commitments* for the coming year. A *goal* is defined as what you want, hope, and will stretch to achieve. *Commitment* is what you will do for sure, no questions ask, guaranteed – consider it done!

1. My <b>BILLING GOAL</b> for the year is:		
2. My <b>BILLING COMMITMENT</b> for the year is:		
3. MY <b>CASH-IN GOAL</b> for the year is:		
4. MY <b>CASH-IN COMMITMENT</b> for the year is:		
<b>Billing Goal</b> 1 <sup>st</sup> Quarter		<b>Billing Commitment</b> 1 <sup>st</sup> Quarter
<b>Billing Goal</b> 2 <sup>nd</sup> Quarter		<b>Billing Commitment</b> 2 <sup>nd</sup> Quarter
<b>Billing Goal</b> 3 <sup>rd</sup> Quarter		<b>Billing Commitment</b> 3 <sup>rd</sup> Quarter
<b>Billing Goal</b> 4 <sup>th</sup> Quarter		<b>Billing Commitment</b> 4 <sup>th</sup> Quarter

1. <b>Income Goal:</b>	
2. <b>Average Fee:</b>	
3. <b>Average Commission %:</b>	
4. <b>How Many Placements Needed</b>  A. Per Year:  B. Per Month:	A.  B.
5. <b>Number of 1<sup>st</sup> Time Sendouts to Make a Placement:</b>	
6. <b>Number of 1<sup>st</sup> Time Interviews Needed Weekly:</b>	
7. <b>Number of Submittals to Secure a 1<sup>st</sup> Time Sendout:</b>	
8. <b>Number of Candidate Recruiting Presentations Needed to Secure a Submittal:</b>	
9. <b>Number of Candidate Recruiting Presentations Needed Per Day to Secure Required Submittals:</b>	
10. <b>Number of Calls Made to Reach Goal for Candidate Recruiting Presentations per Day:</b>	

MARKETING OBJECTIVES	
1. Number of Job Orders to Equal a Placement:	
2. Number of Marketing Presentations to Secure a Job Order:	
3. Number of Calls Needed to Have a Marketing Presentation:	
4. Number of Marketing Calls to Hit Marketing Presentations Goal:	
A. Per Day:	A.
B. Per Week:	B.
C. Per Month:	C.

1. When will I plan each day: \_\_\_\_\_

\_\_\_\_\_

2. How will I ensure that nothing will prevent me from planning each day: \_\_\_\_\_

\_\_\_\_\_

3. How much planning time is required for me to generate my targeted daily activity: \_\_\_\_\_

\_\_\_\_\_

4. How much time will I devote each day to new marketing: \_\_\_\_\_

\_\_\_\_\_

5. How will I continue to learn from my associates, and in turn, challenge them as well:

\_\_\_\_\_

\_\_\_\_\_

6. What are my educational goals for the upcoming year: \_\_\_\_\_

\_\_\_\_\_

7. What are the necessary books I need to read this year: \_\_\_\_\_

\_\_\_\_\_

8. What are my weak areas that, unless corrected, will prevent me from obtaining my goals:

\_\_\_\_\_

\_\_\_\_\_

9. How will I hold myself accountable to the professional standards I have set for myself?

\_\_\_\_\_

\_\_\_\_\_

10. Who are my accountability partners (mentors): \_\_\_\_\_

\_\_\_\_\_

## ADDITIONAL READING

### ***Top Reasons to Set Goals***

From [www.timethoughts.com](http://www.timethoughts.com)

1. **Goals can give you a target to aim for.** Dr. Maxwell Maltz, author of the classic *Psycho-Cybernetics*, said that human beings have a built-in goal seeking "success mechanism" that is part of the subconscious mind. This success mechanism is constantly searching for ways to help us reach our targets and find answers to our problems. According to Maltz, we work and feel better when our success mechanism is fully engaged going after clear targets. All we have to do to use this mechanism is to give it a target. Without one, our success mechanism lies dormant, or worse, pursues targets we didn't consciously choose.

Goals provide your success mechanism with **clear targets of your own choosing** based on what is most important to you.

2. **Goals can help you concentrate your time and effort.** One important reason goal setters achieve such outstanding results is that they have learned how to focus and concentrate their time, energy, and resources on a single objective; even if it is just for a few hours at a time. Their concentrated power can produce results that are much greater than those achievable through the diffused and unfocused energy many people use to get through their days.

A clear example of the power of the concentration and focusing of energy can be seen in a simple magnifying glass. The light from the sun arrives at the Earth as diffused energy. We know the energy is there because we can feel the heat from sunlight on our skin. When this diffused energy is concentrated through a magnifying glass, and then focused on a specific point, it can easily burn a piece of paper or wood. The same amount of energy that in one instance could only produce a very slight increase in temperature, when focused can start a fire. Another example is the laser beam. When all the light waves from a given source are concentrated so that they are all in phase, we end up with a laser beam. When a laser beam is focused on a given target, the results can be astounding: the light waves from a powerful laser beam can easily cut through a thick piece of metal. When we focus and concentrate our time, energy and resources, we can similarly cut through many of the challenges and obstacles that are standing in our way. One major time management challenge we are facing today is that there are more things available for us to do than anyone could possibly attempt, let alone accomplish, in an entire lifetime. If we are not careful, it is very easy to diffuse our time and energy with many different trivial pursuits, aimless distractions, and general business. Goals provide a way to focus and concentrate your time and energy into carefully chosen targets that are designed to make significant positive impacts in your life.

3. **Goals can provide motivation, persistence and desire.** Most significant accomplishments are riddled with obstacles, struggles, and failures. It is estimated that Thomas Edison failed over one thousand times before he finally discovered a way to make the light bulb work. It is very rare for something important to be accomplished successfully on the very first try.

If you want to achieve anything significant, it is likely that you will struggle and fail many times before you finally reach your target. High achievers keep picking themselves up after each fall and continue working steadily toward their targets until they finally reach their goal. Struggle and failure are often part of the price you have to pay for high achievement.

As you can see, any major accomplishment requires motivation and persistence. Where does this motivation come from? It comes from your desire and purpose, from the reasons **why** you want to accomplish it. It's been said that a person with a big enough "why" can bear almost any "what" or "how." When your "why" is big enough, you find a way to reach your targets, even if you have to struggle and try many different things to get there. One of the main reasons people give up so easily in the face of failure is that they lose sight of their "why." Goals can help you remember your "big why" when you need to pick yourself up and keep going in the face of adversity.

4. **Goals can help you establish priorities.** You will find many forks in the road between where you are now and where you want to be. Instead of just going with the flow and letting the "current" or other people's interests determine where you end up, you have to consciously decide which way to go.

Goals and the missions, visions, and dreams that inspire them, provide a natural framework to help you identify and establish your priorities and make the "right" choices based on the long-term view of what is most important to you.

5. **Goals can provide a roadmap to take you from where you are to where you want to be.** A well crafted strategy with an accompanying set of intermediate goals provides a framework to reach far away targets. One of the best ways to deal with large or seemingly "impossible" tasks is to break them up into a series of intermediate achievable steps and get to work on each piece. As Brian Tracy likes to say, "By the yard it's hard, but inch by inch it's a cinch!"

Your intermediate goals give you valuable feedback: they tell you whether you are making progress or not, and can warn you if you are getting off course. In almost any endeavor, you will need to make adjustments to your plans and overall strategy as you learn from your mistakes, face and overcome obstacles, and experience unexpected setbacks. As the old adage states, "No plan survives first contact with the battlefield."

Your strategy will also need to change and adapt based on the situations and circumstances you experience.