

Initial Summary: Summarize your thoughts about the past year as you begin this exercise:

1. What stands out for you the most about this past year?

2. What were your 5 primary goals for this year?

3. Specifically, how did your production compare to your desired target goals at the beginning of the year?

4. Did your year's results mirror the focus and energy you had when setting your goals for the year?

5. If so, what did you do to stay on track?

6. If not, what caused you to lose your momentum or take you off your game?

7. What were your most significant learning opportunities?

8. What accomplishments do you feel most proud of so far?

9. What do you believe are your top 5 strengths?

10. What changes would improve your performance next year (areas of developmental opportunity)?

Next Year's Plan Summary: Define your practice or desk and specifically discuss your strategies for building that practice or desk.

1. Besides measurements weekly, how will you know if your business is growing? Be specific. Include clients in development in this section.

2. What pitfalls should you watch for?

3. What type of benchmarks will you establish as signals that course correction is necessary?

4. What will you do to correct your course?

5. What are your weakest areas that unless corrected, will prevent you from attaining your goals?

6. What are some of the things that set you apart from your competitors?

7. What do you need specifically to accomplish your strategies?

8. Specifically, which 5-10 clients by name, represent your most likely source of expanded business? What action do you plan to take to get closer to these clients?

9. Discuss client visits, specific tools, websites, or any other strategies you will use:

10. In what associations are you currently a member? What associations are you planning to join this coming year?

11. What other tools/resources do you plan to invest in for the coming year?

12. What are your 2008 income goals? Minimum acceptable? Ideal? Ecstatic?

13. What level of billings/cash-in will be needed throughout the year to reach those goals:

January

July

February

August

March

September

April

October

May

November

June

December

14. How important is it for you to succeed this coming year by reaching all of your goals? What would be acceptable to you not to achieve? For what reasons?

15. What hours are you willing to commit to your career goals in the coming year? Please be clear and specific.

16. What would stop you or slow down your momentum in achieving your goals?

17. What key areas of personal and professional development are you focused on accomplishing in the coming year?

18. What are your future career plans? Where do you see yourself in:

1 year?

3-5 years?

10-20 years?

19. What training/coaching will help you reach your commitments?

20. What is the single most important thing you need from your coach or team lead that would help you the most in achieving your goals?

What are the three primary, quantifiable objectives that you want to have accomplished by the end of Quarter 1:

- 1.
- 2.
- 3.

What are the three primary, quantifiable objectives that you want to have accomplished by the end of the year:

- 1.
- 2.
- 3.

What else is important to your annual goals and objectives that has not been discussed?

Personal 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. _____
 - _____
 - _____
 - _____

Financial Goals:

1. _____
 - _____
 - _____
 - _____

2. _____
 - _____
 - _____
 - _____

3. _____
 - _____
 - _____
 - _____

Health Goals:

1. _____
 - _____
 - _____
 - _____

2. _____
 - _____
 - _____
 - _____

3. _____
- _____
 - _____
 - _____

Personal Vision Statement:

Personal Responsibility and Accountability Statement:

