



Real**Astute**

# QUARTERLY GOAL-SETTING SEMINAR

## INCLUDED:

Journaling exercise | Goals and projects planner |  
Setting SMART goals exercise | Goal-setting work-  
sheets | Project-planning worksheets | Intelligent  
reflection | One-page business plan | Marketing  
plan | Procrastination worksheet

## THOUGHTS ABOUT THE LAST 90 DAYS

What were your three biggest wins from the previous quarter?

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What did you learn from each win?

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How can you double down on those wins and the momentum they created?

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What was an unexpected source of motivation or inspiration — and how can you reproduce it?

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What went wrong last quarter?

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If you didn't achieve what you wanted last quarter, why?

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What were the three worst things that happened, what can you learn from them, and what can you do better?

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Is there anyone you know whom you could ask for help today?

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What do you need to learn this quarter?

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## POSSIBLE GOALS AND PROJECTS

"All goals are projects but not all projects are goals."

For our purposes, a goal is an area of focus that will take you approximately 90 days to complete (or a part of which you can complete in approximately 90 days). A project is an area of focus that that you want to (or need to) spend time working on during this 90-day period — but won't take the full 90 days to complete.

A large rectangular area filled with a light gray grid pattern, resembling graph paper. This area is intended for users to write down their goals and projects.

## HOW TO SET THIS QUARTER'S S.M.A.R.T. GOALS

Whether you are an entrepreneur, a 9-to-5 office worker, or a stay-at-home parent, you need goals. You will have no idea where you are going and if you're making progress in the absence of them. Setting goals using the SMART methodology is an excellent way to get started. It is a method of writing goals that follow specific criteria. So what are "SMART" goals anyway?

It is generally accepted that the SMART acronym was codified in 1981 by George T. Doran, a consultant and former Director of Corporate Planning for Washington Water Power Company, in a paper entitled "There's a S.M.A.R.T. Way to Write Management's Goals and Objectives." In his paper, Doran provided some clarification for readers on applying the SMART acronym:

"How do you write meaningful objectives?—that is, frame a statement of results to be achieved, Managers are confused by all the verbal from seminars, books, magazines, consultants, and so on. Let me suggest therefore, that when it comes to writing effective objectives, corporate officers, managers, and supervisors just have to think of the acronym SMART. Ideally speaking, each corporate, department and section objective should be: (SMART)."

— GEORGE T. DORAN

SMART stands for "specific, measurable, attainable, realistic, and time-bound." You will see people using its variations, for example, "relevant" or "rewarding" instead of realistic and "achievable" or "action-oriented" instead of attainable. Through the SMART goals strategy, you will have a better understanding of your goals and your motivation.

### HOW TO WRITE SMART GOALS

Setting SMART goals can boost productivity and make it easier to achieve the goals, but how do you write them? Writing them might seem complicated at first

blush, but shouldn't be. Whether it's your business, personal development, or studies, you can apply the concept of SMART goals.

**S = SPECIFIC:** First of all, you need to be very specific about what you want to achieve. Be as clear and specific as possible when it comes to objectives. For example, instead of saying that you want to get more profit in a particular financial year, be clear about exactly how much.

**M = MEASURABLE:** How will you know whether the goal you had set was successful or not? This is why it is essential to have a goal that is not just specific, but measurable too. For example, instead of saying you will make more sales, you can set a goal like increasing the sales by at least 10% compared to last year.

**A = ATTAINABLE:** Is the goal you've set attainable or achievable? Often the mistake that so many goal-setters make is that they set goals that are impossible to achieve. It is good to have big dreams, but it is also essential to set goals that seem achievable.

**R = RELEVANT:** Have you set a relevant or irrelevant goal? Whether you are setting the goal for your business or for your own personal development, it needs to align with your business objectives or personal aspirations.

**T = TIME-BOUND:** Last but not least, make sure your goal has a specific deadline. Adding a time-bound component to the goal creates a sense of urgency and propels you toward the goal and boosts productivity. Keep in mind; you need to set the ideal time bound for your goal. Too short or too long and time-bound loses its relevance and power.

The "SMART goals" template makes it easier to write down goals. By writing your goals following the SMART goals rule, you will be clearer about what you want to achieve.

## THE VALUE OF THE “RULE OF THREE” IN SETTING GOALS

The Rule of Three is a straightforward method to get results. As opposed to getting overwhelmed by your tasks, using the Rule of Three, you bite off 3 things you can achieve in a particular time period. This places you in complete control. If absolutely nothing else, it provides you with a simple framework for the day (or month, quarter, or year).

### THREE IS THE MAGIC NUMBER

Three is a fascinating number, not just in fairy tales. The army uses the Rule of Three to instruct survival training: 3 minutes without air, 3 days without water, 3 weeks without food, 3 months without hope. Three is the magic number.

### THE RULE OF THREE APPLIED

Here's the way the Rule of Three applies to time:

- 3 goals for the day
- 3 goals for the week
- 3 goals for the month
- 3 goals for the quarter
- 3 goals for the year

A goal is just a result that you want to achieve. When you can identify three results at each level (day, week, month, quarter, year), you can see the forest AND the trees. To put it another way, your three results for the entire year are larger than your three results to the month, are larger than your three results to the week, are larger than your three results to the day. The Rule of Three is your simple sanity test.

### GOALS OVER ACTIVITIES

Don't confuse activities with results. You're striving for three results (or goals). This can help you ground your activity against something meaningful for you. It also allows you to concentrate on the end, not the means. Among the best ways to get results is to stay flexible in your approach while keeping your eye on the prize.

## SETTING GOALS

If you find you get lost in your goals or if your outcomes are too complicated, try the Rule of Three. For instance, here are 3 sample outcomes:

- Reduce my body fat to below 20% by December 1.
- Take a two-week trip to Mexico City by January 15.
- Finish my screenplay before my birthday.

### GOALS ARE SIMPLE VISIONS

The goals are simple visions of the future. You can experience them, and you may watch them like a scene in a movie. While these outcomes are simple to say, there's a lot behind them. For instance, reducing your body fat actually involves “going to the gym three days a week,” and “eating vegetarian or vegan at least twice a week,” etc.

### PRACTICING THE RULE OF THREE

Here are a few quick ways you may use the Rule of Three:

- Start your day with the Rule of Three. As soon as you wake up, figure out three things you want to accomplish. Obviously, you will usually achieve way more than that, but three is a way to prioritize and focus.
- Test yourself: What are the three things you would like to accomplish for the day? If you have to look them up, it's too complicated. In case your three goals are complicated, chances are they're really projects, rather than tasks. Play around with how you say your three outcomes out loud.
- By paying attention to your results, you'll start to figure out how long things really take you. You'll get better at estimating both for the day and for the week (and that has a bearing on your goals for the quarter and year as well). Remember, you get to practice every day, so all you need to do is pay attention, and you'll improve.
- Whenever you end your day, take time to note your three accomplishments for the day. An attitude of gratitude builds momentum. If you didn't accomplish the three outcomes you wanted, then at least you learned something. Either bite off smaller chunks or try another approach.

## GOAL 1 WORKSHEET

### WHAT IS YOUR GOAL?

HOW WILL ACHIEVING THIS GOAL IMPROVE MY LIFE?

1. \_\_\_\_\_  
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2. \_\_\_\_\_  
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3. \_\_\_\_\_  
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4. \_\_\_\_\_  
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5. \_\_\_\_\_  
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HOW WILL NOT ACHIEVING THIS GOAL WORSEN MY LIFE?

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WHAT, SPECIFICALLY, NEEDS TO HAPPEN — TO GET STARTED, TO KEEP GOING, TO COMPLETE THIS GOAL?

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WHAT DEADLINES NEED TO BE MET IN THE NEXT 90 DAYS TO REACH THIS GOAL?

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WHOM CAN YOU ASK FOR GUIDANCE AND ACCOUNTABILITY TO HELP WITH THIS GOAL?

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NOTES TO SELF / ENCOURAGING WORDS

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## GOAL 2 WORKSHEET

### WHAT IS YOUR GOAL?

HOW WILL ACHIEVING THIS GOAL IMPROVE MY LIFE?

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HOW WILL NOT ACHIEVING THIS GOAL WORSEN MY LIFE?

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NOTES TO SELF / ENCOURAGING WORDS

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## GOAL 3 WORKSHEET

### WHAT IS YOUR GOAL?

HOW WILL ACHIEVING THIS GOAL IMPROVE MY LIFE?

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HOW WILL NOT ACHIEVING THIS GOAL WORSEN MY LIFE?

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NOTES TO SELF / ENCOURAGING WORDS

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PROJECT PLANNER

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PROJECT PLANNER

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## ONE-PAGE BUSINESS PLAN FOR REALTORS

In 2021, I will close \_\_\_\_ transactions.\* Of those transactions, \_\_\_\_ will be buyers and \_\_\_\_ will be sellers. At an average sales price of \$\_\_\_\_ and an average commission of \_\_\_\_%, my gross commission will be \$\_\_\_\_ and my net commission will be \_\_\_\_.

\*On average, you will need to have approximately 50 business-based conversations (with your SOI and/or members of the general public) for each transaction.



The top 5 ways that achieving this goal will **improve** my life

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



The top 5 ways that failing to achieve this goal will **worsen** my life

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### MARKETING STRATEGIES & ACTION STEPS TO HELP ME ACHIEVE MY GOAL



Strategy 1

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Strategy 2

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Strategy 3

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Strategy 4

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Strategy 5

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Action steps

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
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3. \_\_\_\_\_  
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4. \_\_\_\_\_  
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Action steps

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2. \_\_\_\_\_  
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Action steps

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Action steps

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Action steps

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## INTELLIGENT REFLECTION ON 2020

Name of business

What I do

How I do it

Whom do I serve

What problem do I solve?

What solutions do I provide?

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

# YEARLY MARKETING-PLAN WORKSHEET

## DAILY

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### IDEAS FOR INSPIRATION

Engage with sphere of influence (SOI)/past clients on social media | Write 2-3 personal notes | Work any incoming leads

## WEEKLY

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### IDEAS FOR INSPIRATION

Make check-in calls to SOI | Schedule face-to-face coffees or meals with high-value members of your SOI | Record a video message and post to social media | Write a blog post

## MONTHLY

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### IDEAS FOR INSPIRATION

Send an item of value in the mail to your SOI (and follow up with a phone call) | E-mail a newsletter to your SOI | Drop off a small gift to high-value members of your SOI | Design an infographic and post it on your social media accounts

## QUARTERLY

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### IDEAS FOR INSPIRATION

Plan small events for your SOI throughout the year: Bowling, trapeze school, painting party, wine/cocktail tasting, karaoke, movie night at a local theater, cooking classes, golf, Escape Room, shredding event | Do a case-study video of one of your recent

## BIENNIALY

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### IDEAS FOR INSPIRATION

Host a buyer or seller seminar | Host a business-to-business breakfast | Host a contest or giveaway | Re-categorize your database | Update your online profiles | Write an article for your local newspaper | Host a small client function (10-12 people, max)

## YEARLY

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### IDEAS FOR INSPIRATION

Host an annual client-appreciation function | Deliver closing statements to previous year's clients with a small gift | Mail holiday cards to your SOI | Deliver CMAs to high-value members of your SOI

## PROCRASTINATION WORKSHEET

### 1 WHAT

What important task did I not complete?

### 2 WHY

The category that best describes why I likely procrastinated in completing this important task:

- ☐ It's boring
- ☐ It's overwhelming
- ☐ It's unpleasant
- ☐ Something else
- ☐ It's difficult

### 3 THOUGHTS

Consider why I'm procrastinating on this task and what I can do to overcome the factors that made this hard for me.

### 4 INITIAL ACTION

Here's one thing I can do in 2 minutes or less, to create momentum on this task:

FOLLOW-UP ACTIONS

☐ \_\_\_\_\_

☐ \_\_\_\_\_

☐ \_\_\_\_\_

### 5 ACCOUNTABILITY

How can I stack multiple layers of accountability to help me to complete this task.

### 6 REWARD

My reward for completing this task:

### 7 DISTRACTIONS TO AVOID

What distractions do I commit to block to help me focus on this task?

### 8 TIME BLOCK

I will block my calendar for this specific date and time to get started on this task.

DATE

TIME

## POST-SEMINAR ACTIVITY CHECKLIST

- ☐ Complete all journaling exercises.
- ☐ Make a list of 15-20 possible goals and projects.
- ☐ Identify 3 goals for the quarter.
- ☐ Identify 4-8 projects for the quarter.
- ☐ Identify an accountability partner (or partners) to assist with each goal or project.
- ☐ Break down each goal and project into its smallest action steps. (If you struggle with the this task, reach out to your accountability partner or coach for assistance.)
- ☐ Put each action step for each goal and project on your calendar or to-do list with a due date. (This is probably the MOST IMPORTANT step. Do not skip it.)
- ☐ Share your goals and projects with your loved ones.
- ☐ Make a monthly appointment with your accountability partner or coach to check in.
- ☐ Notes

A large rectangular area filled with a light gray grid pattern, resembling graph paper, intended for taking notes.

# April 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

# May 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					



# June 2021

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Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			