



2023
PERSONAL
GOAL SETTING



CREATING
EXPERIENCES
THAT MATTER™



GOAL PLANNING—ADVICE TO GET YOU STARTED

It's a new year, and a new opportunity to plan for success. Success in life, both personally and professionally should be intentionally planned. We believe the more intentional we are with what we want to accomplish, the higher likelihood of achieving our goals. This book will provide you the template for developing your plan.

GOALS

A goal is the desired result that a person/organization seeks to achieve because of implementing strategies and intentions. A goal:

- › Defines the destination
- › Changes the direction or mindset to move toward a new destination
- › Creates the necessity to develop specific tactics

STRATEGIES

Often confused with goals, strategies are the stepping stones to achieving a goal. Strategy, which is derived from ancient Greek for "generalship," is the method or plan that is executed to bring about a desired future, the Goal. Strategies are the specific projects or tactics to get from where you are to where you want to go.

ACTION ITEMS

Stated simply, this would be the step-by-step actions or activities that must take place for a strategy to be achieved or for a strategy to be implemented. Set these at 90-day increments and in order of priority.

The overarching message is that a good plan that is fully executed today is better than a perfected plan that gets designed tomorrow. Plan for success, analyze and adjust every 90-days.

HERE'S TO A TERRIFIC 2023!



LET'S GET
STARTED

BOOST YOUR AWARENESS

2022 SELF EVALUATION

Be honest as you look back at the previous year. The intention of this exercise is to identify the key habits, disciplines and activities you want to carry into the year ahead and which ones you need to leave behind.

1. What were your successes, what went well?

2. What were the challenges, what didn't go so well?

3. What did you hope to accomplish but did not, and why?

4. What were your 3 top moments or things that brought you joy?

2022 SELF EVALUATION CONT.

5. What were 3 things that drained your energy or focus?

6. What is one thing you will do differently, and why?

7. What skills and talents do you use the most?

8. How are you preparing for your days/weeks?

SETTING PLANS FOR 2023

Looking at the future and making a plan takes commitment and focus. Be honest with your intentions.

1. What are 3-5 of your personal values?

2. What are your key priorities and how will you time-block for them?

3. What are your professional intentions for 2023?

4. What are your personal intentions for 2023?

5. What will be your daily/week habits to achieve your plan?



**FOCUS
ON THE GOAL
NOT THE
OBSTACLES**

RAISE YOUR GAME

**MAKE YOUR PLAN FOR THE
5 KEY AREAS IN YOUR LIFE**

**PROFESSIONAL • HEALTH • LEARNING
FINANCES • RELATIONSHIPS**

- Set a goal for 2023 in each category and set your 90-day strategies for each goal (including what to keep, change or start)
- Identify the action items necessary
- Save your 90-day sprint and repeat the planning process every 90 days and make adjustments as needed to stay on goal

PROFESSIONAL GOALS

90-day time frame: _____

Enter dates

Goal:

What will you keep doing?

What will you change?

What will you start doing?

HEALTH & WELLNESS

90-day time frame: _____

Enter dates

Goal:

What will you keep doing?

What will you change?

What will you start doing?

INTELLECTUAL & LEARNING

90-day time frame: _____

Enter dates

Goal:

What will you keep doing?

What will you change?

What will you start doing?

FINANCIAL SECURITY

90-day time frame: _____

Enter dates

Goal:

What will you keep doing?

What will you change?

What will you start doing?

RELATIONSHIP & BALANCE

90-day time frame: _____

Enter dates

Goal:

What will you keep doing?

What will you change?

What will you start doing?

List of Strategies to Implement into Personal Development & Wellness Plan:

1. Evaluate myself, my schedule and my wins and losses on a weekly basis. Integrate this evaluation practice so I adapt each week to be my very best self and deliver the best experience to my customers/co-workers.
2. Identify where I lose a customer, then introduce a higher touch at that point, and remove any friction from the process to increase my app-to-close ratio.
3. Be mentored by a leader in your area or business coach to learn the disciplines, practices and tactics that bring them success. Implement the learnings from these coaching sessions, and amend strategies as needed.
4. Dedicate ~5 hours per month toward mastering my craft. This may include products, technology, lead-generating activities and/or consumer awareness.
5. Increase my knowledge base, my skill level on 2 things that will expand my value and expertise.
6. Grow your team if needed to increase business.
7. Discover and mentor someone to enhance your team.
8. Adopt strong weekly planning so I have an effective work-life balance, where my personal and professional goals are complementary, and one isn't sacrificed.
9. Listen to/read one book per month that will keep me focused on my personal and professional goals.
10. Listen to ~2 hours of podcasts per week that keep me focused on my personal and professional goals.
11. Sign up for coaching or an accountability partner that will keep my goals and intentions on track in order to achieve my personal and professional goals.

List of Strategies to Implement into Personal Development & Wellness Plan:

1. Set a consistent schedule for daily exercise, committing to move my body every day.
 2. Make my health a priority, including making appointments for wellness checks and testing, to ensure that I'm providing myself and my family the healthiest version of me.
 3. Commit to start or continue an exercise regimen and food plan that is realistic and improves my overall health.
 4. Join a sports team/league to get into physical shape and expand or maintain team interactions.
 5. Explore mental health needs for myself and my family, pulling in support where needed.
 6. Determine the right work schedule for me and stick with it. Meaning, when I do what, when I start and end, where I do my best work, when I take breaks, etc.—to ensure I am achieving my professional and personal goals.
 7. Work on better sleep habits to improve my health—by managing my routines, schedule and patterns.
 8. Give something up. Evaluate a bad habit, practice or spending habit to eliminate this year, come up with a plan for success; and replace my bad habit with a positive one.
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9. Increase my learnings and skills by dedicating ~2 hours per week to engaging with online learning resources—such as podcasts, audiobooks, online courses and other knowledge-based resources.
 10. Read ~12 books this year (at least one book per month).
 11. Learn something new. This could be either in work life or personal life. Carve out time each month to dedicate toward this new skill or learning.
 12. Start a blog or journal weekly writing practice. Capture things such as dreams, memories, history, gratitude, human interactions, or other thoughts and intentions.
 13. Schedule time every day/week for personal meditation, reflection and learning.

List of Strategies to Implement into Personal Development & Wellness Plan CONT:

1. Set a monthly budget and commit to keeping it.
2. Obtain a copy of my credit report and correct any errors, then use the report to build a plan to begin paying down debt.
3. Increase my overall savings and investments by committing to save ~10% of my earnings.
4. Determine a minimum of three financial goals (i.e., saving for a down payment, purchasing a car or investing) including likely roadblocks, as well as actionable steps required to meet my goals.
5. Dedicate myself to creating work-life harmony by diligently ensuring that there is time every day to feed myself professionally and personally.
6. Work as a household to declutter or organize our home. Donate excess when possible or dispose of broken or obsolete items.
7. Plan, save for and take that dream vacation with those I love.
8. Get my financial house in order by setting up a personal will or trust this year.

9. Pledge to eating dinner as a family (whatever family means to me) at least 4 times per week.
10. Allocate ~2 hours per week for one-on-one time with my partner and children doing something that connects and brings us peace. This can be going for a walk, sitting down for an uninterrupted coffee break, starting a new hobby together, or anything else that we find enjoyable.
11. Tend to personal relationships, carving out ~5 hours per week to touch base, connect and reinforce the importance of those relationships.
12. Commit to, or enhance, my involvement with a charity or cause that matters to me via donations or volunteering.
13. Join a club, community or networking group to establish new friendships and/or build connections that can provide an opportunity to advance professionally.
14. Bring a pet into the household this year.
15. Host a friend-dinner party on a quarterly basis, or another favored activity, to connect with friends that are important.

NOTES

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