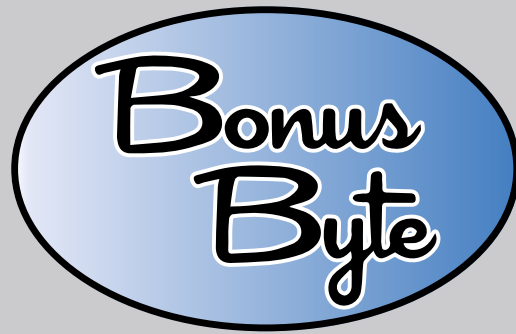


BUD

TO



BOSS

Creating and Using a Goal Planning Form

CREATING AND USING A GOAL PLANNING FORM

by Kevin Eikenberry

This form is a way to help you define and plan for reaching your goals. Planning in this way will help you reach your goals *faster* and *easier*. If you have lots of goals, fill out one form for each goal. If this is the case be realistic on your time lines and remember to focus on just one or two goals at a time.

Use this information to help you fill in the goal planning template on the next page.

Goal	Write your learning goal statement as a statement of fact. Write it as if you have already accomplished the goal. Writing it in present tense sets the desired outcome more clearly in your mind.
Key words in the Picture	After visualizing yourself with the goal achieved (and enjoying the results and benefits), write down some of the key words from your visualization to help you recapture the picture anytime.
Benefits	Listing the benefits you will gain, both personally and professionally, will help you stay focused and reminded of the value of your learning goal. Remember to think of short term benefits and those benefits you might enjoy for a long time as well.
Action Steps	Action steps need to be specific and listed chronologically. Think of reaching your learning goal as a project and these are the steps in your project plan. Put realistic (though “stretch”) completion dates on each step. After completing the full planning sheet, look at your resources and barriers, and make sure they are accounted for in your action steps.
Resources/Levers	Consider what you’ll need for the completion of this goal. Whose help will you need? What information will you require? How will you get all of this information and knowledge? List all the resources that you will need here - even if you don’t know how you will get them at this point.
Problems	Barriers need to be identified now. Why? Because once they are identified and acknowledged you are on the way to overcoming them. By writing them down now they are less likely to throw you off track when they do arise, and you’ll be better prepared to overcome them.
Success	You must measure your progress! Setting up measures will allow you to see your progress and to make sure you know what success looks like. Don’t make these measures too difficult, or too hard to track, but do have a way to chart your progress. These measures will track progress and help you know when the goal is reached.

Planned Completion Date

Resources Required/Levers I'll Apply

Potential Problems/ Barriers

I'll Know I've Succeeded When . . . (measurements)

Signature _____ Date _____

ABOUT BUD TO BOSS

Bud to Boss provides new leaders and organizations looking to develop new leaders with insight, resources and powerful learning opportunities designed to specifically address the challenges of successfully transitioning from peer to leader.

To speak with someone about how we can help you or your organization, send a note to **info@BudtoBoss.com** or call the number on this page.

You can learn more about us at:

BudtoBoss.com

Our products and services include:

- Books & Learning Resources, including the best-selling book *From Bud to Boss*
- Classroom & Virtual Workshops
- The Bud to Boss Toolkit eLearning Course
- A Variety of Enterprise Solutions including Onsite Training and Certification



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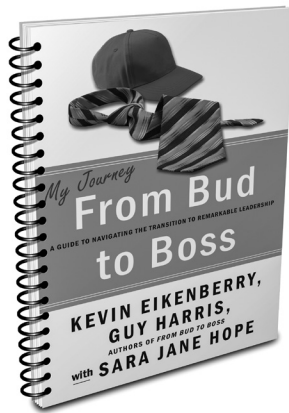
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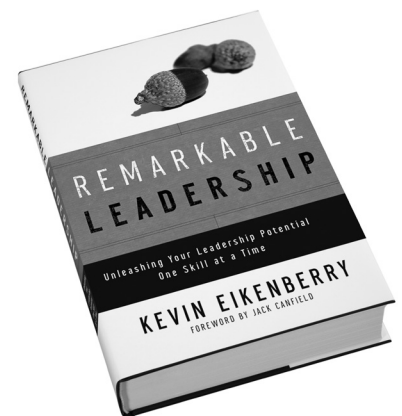


My Journey From Bud to Boss

A companion volume to the From Bud to Boss book, the Journey is a workbook designed to help you apply the knowledge gained to actual work experiences. It includes activities, questions, and exercises designed to take you beyond the concepts introduced to you during the Workshop or the book. And while this book is completely designed to be written in, all of the templates and tools are available in both PDF and Word document form so that you can use them over and over.

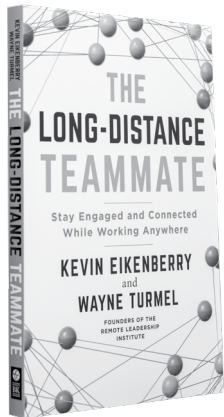
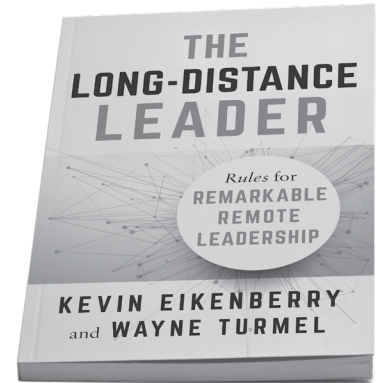
Remarkable Leadership

is a practical handbook written for anyone who wants to hone the skills needed to become a remarkable leader. This book outlines a framework and a mechanism for both learning new things and applying current knowledge in a thoughtful and practical way. It explores real-world concerns such as focus, limited time, incremental improvement, and how we learn.



The Long-Distance Leader

is a practical, candid look at what it takes to lead people, projects and teams in today's dispersed workplace. The book showcases 19 rules for being a remarkable remote leader, and offers practical models, tools, and best practices to tackle the real-world challenges from how we work and communicate virtually.



The Long-Distance Teammate

Written by the founders of the Remote Leadership Institute, this book is the most authoritative single resource for helping remote workers get work done effectively, build relationships that are both productive and satisfying, and maintain a career trajectory when they are not in constant close contact with their leader, coworkers, or the organization in general.

Check out our website for additional leadership resources including our free video training series, blogs, newsletters, podcast and more!

[BudtoBoss.com/resources](https://budtoboss.com/resources)