SMART-R™ GOALS: INSTRUCTIONS

Goals should be **SMART-R™**: **S = Specific** details on what you want to achieve AND how, **M = Measurable** confirm milestones are reached, **A=Accountable Tasks** to confirm what to do and remain on task, **R=Realistic** in nature and expectations so they are achievable, **T=Timely/On a timeline** to mark a milestone completion, and **R = Resources** to support your success, and find ways that make tasks easier to accomplish while holding you accountable. Once a task is complete check the Complete box. **Below is an example. Your needs and notes may be different than the example**.

Use the blank sheets on the following pages for each goal. You can type as much details as you like directly in the worksheet. Some tasks can become their own goal if they require additional, detailed activities. Please complete the SMART-R Goal Survey to that we can track effectiveness of this tool.

DESCRIBE THE GOAL: Be ***specific*** and make sure the goal is ***measurable*** *and* has ***accountability***.	
I will reach out to at least 2 inner-circle relationships and extended-circle relationships each week over 5 weeks to identify a mutually beneficial opportunity to collaborate or develop the relationship further. I will put each meeting on my calendar and block time to meet with my partners (potential and existing) to see how I can help them and/or how we can help each other. I will give myself 9 months.	**Goal Complete** ☐

ACCOUNTABLE TASKS: List all tasks associated with completing your goal. Include ***accountability,*** and ***realistic*** actions you will take, and ***timeline*** for when you will start and complete the tasks..

Task List	***Start Date***	***Due Date***	***Task Complete***
1. Identify 10 inner-circle relationships: determine their needs and opportunities to facilitate a free peer-coaching demo/workshop. Monitor and track in CREAM Client Profile sheet or Who Do You Know Worksheet; depending on which is appropriate.	3/15/2019	3/20/2019	☒
2. Identify 10 outer-circle relationships to identify any problems they have that peer-coaching can solve; get to know them better and hear their story; building relationship is key. Identify anyone that can move to the inner circle or if support can be obtained in extended circle. Monitor and track in CREAM Client Profile sheet or Who Do You Know Worksheet; depending on which is appropriate.	3/21/2019	4/4/2019	☒
3. Schedule phone meetings with inner and outer circles (4 each week/two from each circle); meet for coffee and catch up if possible. Monitor on Calendar and Tasks.	4/10/2019	5/17/2019	☒
4. Follow up within 14 days; Identify availability for a free workshop/demo with each relationship over the next 6 months. Confirm spots. Monitor on Calendar.	6/15/2019	12/15/2019	☐
5. Leverage newsletter to target key messages, trends, and information for each group; combine where necessary.	7/15/2019	8/16/2019	☐
6. Update presentation and breakout activities for free workshops/demo.	4/15/2019	12/15/2019	☒

RESOURCES & TOOLS NEEDED: List ***resources*** whom you will you contact—including what tools you can use and how the resource can help you achieve your goal and associated tasks.	
Description of resource and special notes	**Contact information**
1. Inner Circle Contacts: (list each person/organization)	Person to contact Contact method
2. Extended Circle Contacts (list each person/organization) Who to call and how; look up on Linked In/SM if needed; find website if needed.	Person to contact Contact method
3. Who You Know Worksheet? Complete worksheet by or before 3/12.	n/a
4. CREAM Client Profile sheet. Complete by or before 3/12.	n/a
5. Budget: $250 – total; make sure there is no conflicts of interests, or corporate compliance issues with buying coffee or lunch for meetings.	n/a
6. Company giveaways (pens, business cards, brochures, "no risk" items)	Contact: VA to order marketing items Send via email: va@reidreadycoaching.com

Note: the items highlighted in blue could be its own goal as there will be many tasks related to the overall goal. For example, if the newsletter should be updated, there are key tasks required such as, cleaning up or updating email list, identifying a theme, revising the content for each CREAM client group (i.e., faith-based and nonprofits, corporations/for-profit, entrepreneurs/vendors, pharma, academia, etc.). Likewise, updating the presentation may include finding images, videos, and content, revisions and review process, or delegating portions of the task.

Thank you for using the **SMART-R™ Goal Worksheet**!

Please contact a Reid Ready® Coach if you have questions about the tool. While it is not mandatory, we ask that you complete the Goal Attainment Survey. Click this link or copy and paste the link in your Browser: https://forms.gle/qgYyA51JLLvKc4fV7. We can also send you the link via email if you request. We will not collect any personal data. The goal is to confirm the validity and reliability of the tool and to ensure that it supports goal attainment from an evidenced-based perspective.

SMART-R™ GOALS WORKSHEET

Complete one worksheet for each goal. Make sure tasks relate to completing the goal described. Add or delete rows as needed. Click in the cell and type. Or, print and hand write.

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	Goal Complete ☐

ACCOUNTABLE TASKS: List all tasks associated with completing your goal. Include ***accountability,*** and ***realistic*** actions you will take, and ***timeline*** for when you will start and complete the tasks..			
Task List	***Start Date***	***Due Date***	***Task Complete***
1.			☐
2.			☐
3.			☐
4.			☐
5.			☐
6.			☐
7.			☐

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3.			☐
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6.			☐
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Task List	***Start Date***	***Due Date***	***Complete***
1.			☐
2.			☐
3.			☐
4.			☐
5.			☐
6.			☐
7.			☐

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