

# Monthly Goal Setting and Self-Coaching



Use this form, your own journal, a notebook or a digital tool to answer the questions below.

- Share your answers with a peer, “pacing partner” or upline for accountability.
- Keep your goal sheet visible for personal accountability and motivation throughout the month.

## What are my goals this month?

List all that apply.

Income  Other

Sales  Team Growth

## How badly do I want or need to reach my goal(s)?

Circle the face that relates to you.

- +

Not that important                      Meh                      Desperately want/need to reach them

## As I consider what I've accomplished in the past, how would I rate my goals?

Fill in the scale.

▲                      ▲                      ▲

**Definitely Doable**  
I've reached a goal like this or close to it in the past.

**A Bit Of A Stretch**  
I've never reached this goal in the past, but it's not out of the question.

**It's A Stretch**  
I've never reached a goal like this. It would be a big step.

## Based on my last two answers, do I want to re-evaluate any goals set for the month, or am I ready to make it happen?

Part of the goal-setting coaching process is to evaluate and question, so you are set up for success. This is a great time to make sure you're aligning with the goal.

Indicators that you should potentially reconsider your goals would be:

A goal with “meh” or lower response on the “how badly scale”

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

A goal that's a significant stretch

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Monthly Goal Setting and Self-Coaching

## What actions will I need to take to reach my goals?

List all actions required to eventually get the results desired.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

A great reference for this is the **Weekly Action Plan** — found in the petPro library.



**If you did this form last month,** take a look at your evaluation and use it to guide your action planning this month.

## On a scale of 1 - 10, how WILLING am I to take the actions required?



### Not really willing.

In all honesty, I'll use any excuse to avoid taking action.

### Meh.

In all honesty, if something comes up I might break my commitments or avoid the things I don't enjoy doing.

### All in!

I'll honor my commitments to myself, because that's what it takes to reach my goals.



If you have a "willingness number" less than 8 at this point, take a minute to list the actions you are not willing to take that are required.

## What would it take to help me get my willingness number up to an 8 or higher?

Take a moment to reflect on this question and make some notes.

Is it a training issue? What training would help? \_\_\_\_\_

\_\_\_\_\_

Is it a fear issue? How can a peer or upline leader help? \_\_\_\_\_

\_\_\_\_\_

Is the effort not worth the reward? \_\_\_\_\_

\_\_\_\_\_

If my efforts delivered the increase in income, how would that income make a difference in my life or the life of those I love and care about? \_\_\_\_\_

\_\_\_\_\_

What is the limiting factor, and what kind of help would help me overcome it? \_\_\_\_\_

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## In the past, what has gotten in my way and stopped me from taking action and/or reaching goals?

List the things that might keep you from taking action and/or reaching goals this month.

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## What can I do now to overcome those obstacles this time before they stop me?

Check all that apply.

- |  |   |
|--|---|
| <input type="checkbox"/> Seek an accountability partner?     | <input type="checkbox"/> Get specific training that I can immediately apply and practice? |
| <input type="checkbox"/> Ask for help?                       |   |
| <input type="checkbox"/> Shadow train with a peer or upline? | <input type="checkbox"/> Other? <input type="text"/>                                      |



When will I take the actions identified above to make sure the obstacles don't get in my way this month?

## Looking at my personal and business calendars and other commitments this month, what might get in my way of taking action and/or reaching my goals?

- Am I already overbooked before I even start adding time for my business?
- Is there an event happening this month that would require me to work more intentionally, or more hours other weeks, so I can be fully present for that event?
- Other?

## What can I do now to overcome calendar challenges captured above?

- Re-evaluate priorities?
- Have I said "yes" to something I really would like to say "no" to? Now is a great time to do that.
- Can I book 15-minute time blocks in between the things already on my calendar and commit to doing income-producing activities in those blocks?

Document your commitment to overcome calendar challenges.



**If you need to address a commitment change with someone, say something like:** "{name}, I just realized I overbooked my calendar and am going to have to back out of this commitment," OR "{name}, I said yes to this before I stopped to look at my work schedule and I'm going to have to back out of this commitment."

Time to commit and make a plan!

## What is/are my first step(s), and when will I take it/them?

What actions do I need to take first that will set me up for future actions?

Focus on the actions that will lead to income production.

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## Commit to a date!

This is not the time to say, "I plan to ..." This is a time to say, "I will do XX on XX date(s)."

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## When are the best times for me to schedule focused and committed work time?

Using pawTree's calendar (found on the last page of this document) or any calendar of your choice (paper or electronic), block committed times to take action (days/times) this month.

- These are the blocks of time that you will take the actions listed in the earlier questions.
- These are APPOINTMENTS with yourself — NOT PLACEHOLDERS!
  - Treat them like a doctor's appointment (you don't cancel important appointments).
  - Life happens — but that doesn't mean you cancel on YOURSELF.  
You reschedule AS SOON AS POSSIBLE!

## How will I celebrate reaching my goals?

Take a moment now to write down how you will celebrate reaching some or all of your goals by the end of the month. This will give you additional mindset motivation.

- Treat yourself to a meal, outing, spa treatment, or something else?
- Call someone who loves to encourage you and let them know when you've reached the goal?
- Let a family member put money in a goal jar, or make a mark on a goal graph. Then, everyone can celebrate getting closer to a goal that needs your pawTree income to become a reality (trip goal, purchasing goal, etc.)
- Other? \_\_\_\_\_

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## End of month follow-up

### Results

What were the actual results from this past month's income-producing activities?

List the results that came from the actions taken over the last month.

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Time to celebrate! Look back on your commitment and take time to celebrate!

### Evaluation

On a scale of 1 - 10, how satisfied am I with my commitment to taking the actions needed this last month?



**Meh!**

I can't say I gave it my best effort.

**All in!**

I'm thrilled with how committed I was to my business plan this month.



Use this answer to be aware of what you want to address and/or be more committed to next month.

What actions do I want to repeat?

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What actions do I want to adjust next month?

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What actions need some training time?

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What actions are not helpful?

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