

A top-down view of a desk with a laptop, a watch, a pen, and a notebook. The desk is light blue. A silver laptop is open in the center. To the left is a white watch with a white strap. To the right is a white pen. In the bottom right corner is a white notebook with a decorative cover. The background is a solid red color.

GOAL SETTING LIKE A BOSS

# OVERVIEW

CALM YOUR CHAOS | ORGANIZE YOUR LIFE | SMASH YOUR GOALS

*"You miss 100% of the shots you don't take"*

Wayne Gretzky







# OVERVIEW

## WHAT YOU'LL LEARN IN THIS COURSE

### MODULE #1

How to utilize proven business strategies and tactics to understand your personal key drivers and how to use them to build a sustainable plan for your personal success

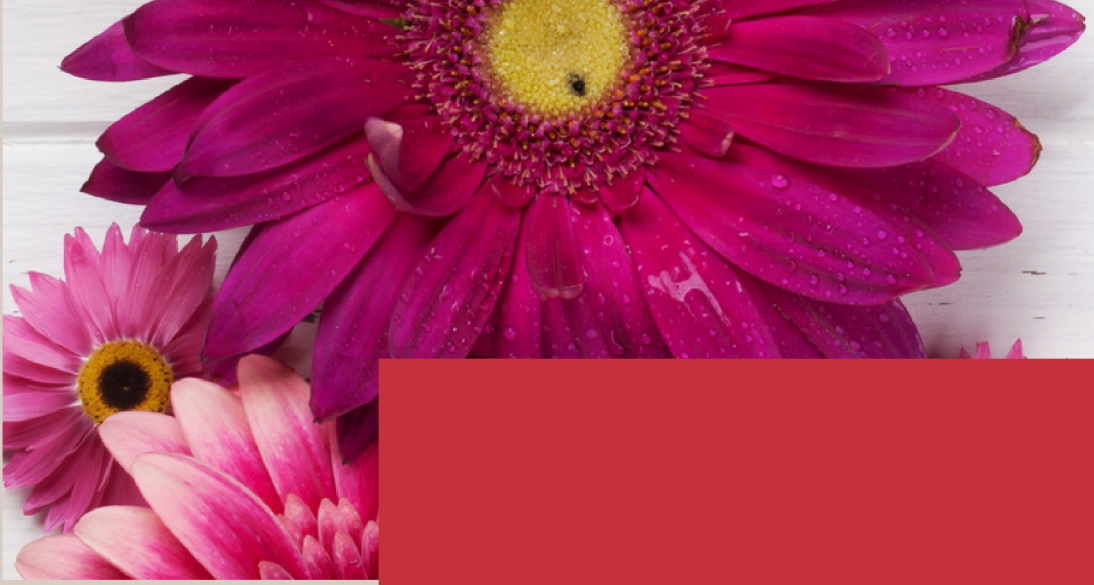
### MODULE #2

How to calm your chaos so you can plan your goals with confidence and without the guilt

### MODULE #3

How to design, plan and smash your goals with confidence and sass





# MODULE ONE

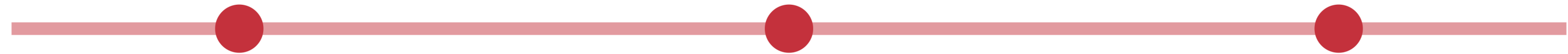
## INTRODUCTION

Reviewing and showcasing the benefits of using business strategies and tactics into your personal life that will help you understand your own key drivers for success, how to overcome procrastination and get motivated to smash your goals.

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# WHAT YOU'LL LEARN



## UNDERSTAND

Your Core Values

## LEARN

SWOT & Flip

## IMPLEMENT

Vision Statement



BIG ASS GOAL DIGGER

# MODULE ONE

KNOW THY SELF



# CHECK IN

WHAT'S IMPORTANT TO YOU

## VALUES

Explore what your values are and why they are important to you

## PRIORITIES

Aligning your priorities to your values

## BOUNDARIES

What you're willing to say yes and no to in order to achieve your goals

## MINDSET

Understanding how your mindset may be helping or hindering your goals

# GOING DEEPER

## EXAMPLES

### VALUES

- Loyalty
- Integrity
- Prosperity
- Family
- Kindness
- Continued Learning
- Authenticity
- Diversity
- Respect

### PRIORITIES

- Family
- Fun + Adventurous
- Personal Finances
- Community Work
- Health + Wellness
- Personal Growth
- Vocation
- Professional Growth

### BOUNDARIES

- Creating "I will" and "I won't" statements
- I will not work past 6pm on Fridays
  - I will take a lunch every day, away from my desk
  - I will finish the course I signed up for

### MINDSET

- Create mantras that motivate, inspire + shift your mindset.
- I am brave
  - I am worthy
  - I am willing to learn
  - I am doing the work
  - I am capable of anything I desire



# SWOT, NOW?

## APPROACH TO GOAL SETTING

- **STRENGTHS**

What are you really good at? Why?

- **OPPORTUNITIES**

What do you want to learn or experience?

- **WEAKNESSES**

What demotivates you? What's your cryptonite?

- **THREATS**

What are your triggers for self sabotage? Why?

# SWOT ANALYSIS

## EXAMPLE

### STRENGTHS

Punctual  
Determined  
Creative  
Methodical

### WEAKNESSES

Disorganized  
Non-Committal  
Forgetful  
Easily distracted

### OPPORTUNITIES

Mentor  
Volunteer  
Learn a new skill

### THREATS

Missed Opportunities/Experiences  
Negative Mindset  
Lose Confidence



# NAME - FLIP - FRAME



## NAME IT

What is the weakness or threat you want to change?

Name the problem or challenge

**"Imposter Syndrome"**

What is it you **don't** want?

**"My insecurities hinder me from applying for a job promotion"**



## FLIP IT

What would it look like if to flip your weakness into a strength or opportunity?

What would it feel like?

**"Empowering"**

What is it you **do** want?

**"I want to be more confident in my skills for a promotion"**



## FRAME IT

What would the positive path look like if the flip was true?

What would your desired outcome be?

**"Being promoted"**

How would your desired outcome make you feel?

**"I would feel excited, proud + empowered"**

# VISION STATEMENT

WHY YOU NEED ONE

## AN INSPIRING STATEMENT THAT DEPICTS YOUR LIFE IN THE FUTURE

- CLARITY** Provides a clear understanding of your why and what's important to you
- INSPIRES** Genuinely excites you and motivates you to live your vision
- IDENTIFY** Provides you a sense of meaning and the direction you want to live your life
- ROADMAP** Provides concrete & actionable steps that help you move forward with your goals
- FILTER** Say "yes" to what matters most and "no" to activities that distract from your vision

# YOUR VISION

CREATING YOUR VISION STATEMENT

- **PRESENT TENSE**

Here and now, write it like it's already happened

- **PASSIONATE**

Write your vision with passion and excitement, without boundaries or limitations

- **POSITIVE VIBES ONLY**

Find your inner Positive Patty and use only language that is constructive and forward thinking in your vision statement

- **PERSONALITY**

It's all about you! So put your whole self into writing your vision statement



# VISION STATEMENT

## EXAMPLES

- **EXAMPLE #1 PROFESSIONAL**

Empower ambitious women to organize their chaos so they have more time to smash their big ass goals and live their life on their terms, without compromise.

- **EXAMPLE #2 PERSONAL**

Financial stability and personal growth while living my life authentically and with purpose. Be passionate about what lights me up and lean into the things that make my heart + soul happy and at peace.

# CREATE A VISION BOARD



## DO THIS

- Include Media/Photos that you embody the future you envision
- Pick things that inspire you
- Use colours that you love
- Include places you want to go
- Put your vision board where it's the most accessible to you, it will help you visualize more clearly and motivate you to keep going!



## DON'T DO THIS

- A half ass job
- Do the exercise and don't look at it again
- Don't procrastinate doing this important step!
- Use other people's vision and expect it to inspire you



# MY BIG VISION

*Write your vision statement here!*

## MY VALUES

*Honesty, Continued Growth,  
Integrity + Kindness*

## MY PRIORITIES

*Family, financial stability +  
personal growth*

## MY BOUNDARIES

*I will not work past 6pm  
I will do yoga twice a week*

## MY MANTRA

*I am grateful, I am humble,  
I am strong, I am fearless,  
I am worthy*







# MODULE TWO

## INTRODUCTION

In this module you will learn how to be the hero in your life, using the C.A.P.E Method I have developed. This exercise will help you calm your chaos so you can plan and execute your goals with confidence + sass!

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# WHAT YOU'LL LEARN



CATEGORIZE

Your Life

ANALYZE

Your Current State

PRIORITIZE

What's important

ENGAGE

Your Goals



BIG ASS GOAL DIGGER

# MODULE 2

CALM YOUR CHAOS

# C.A.P.E.

## METHOD

### CATEGORIZE

Each area of your life is a category (Family, Work, Finance, Wellness, Personal Growth, etc)

### ANALYZE

Using the Method of Start | Stop | Continue to Calm your Chaos

### PRIORITIZE

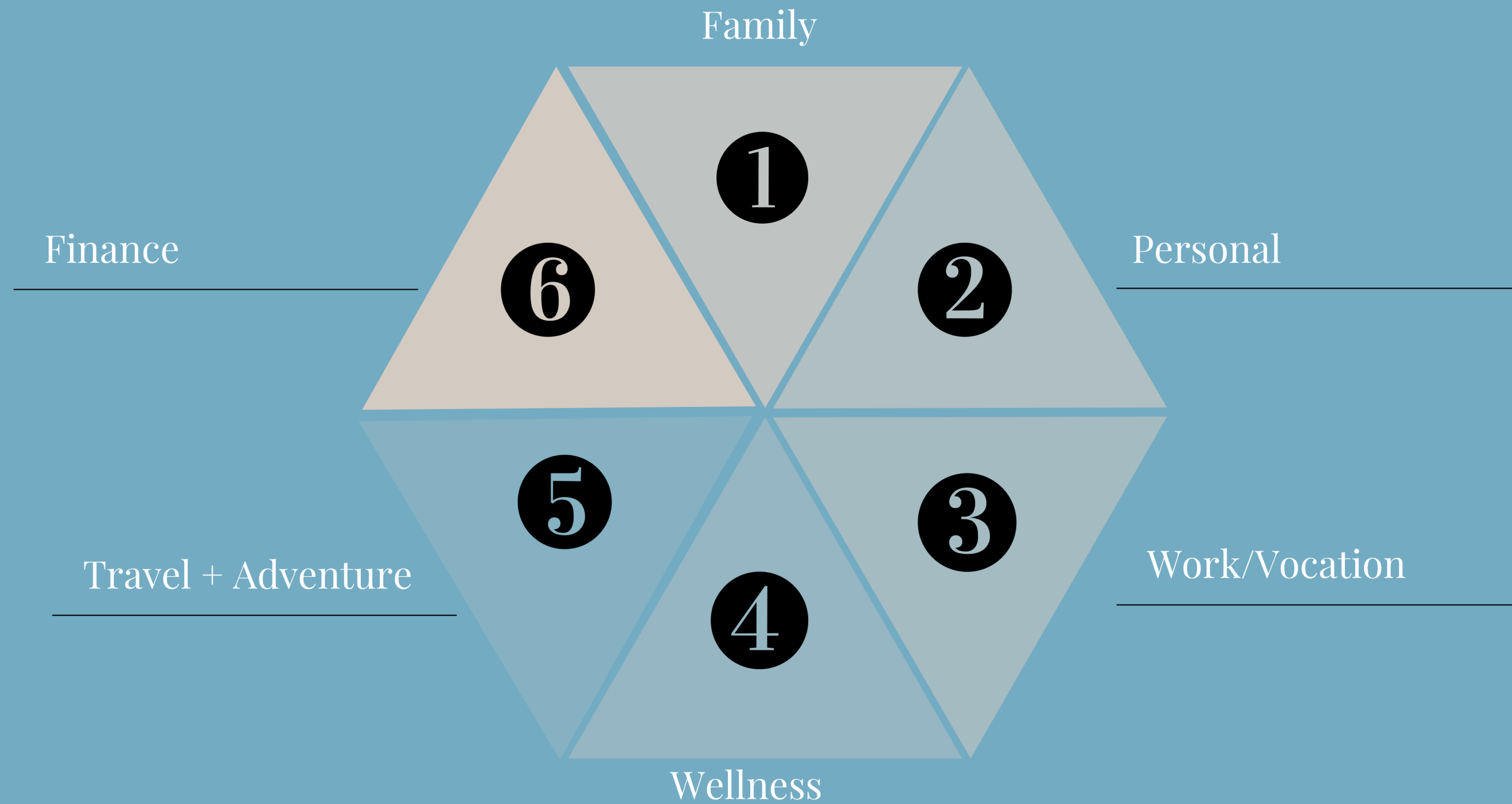
Aligning on what's important to you to achieve your goals and strategies to prioritize like a boss

### ENGAGE

How to get the work done, stay motivated and plan for your milestone rewards!

# CATEGORIZE

AREAS OF YOUR LIFE





# CATEGORIZE

C.A.P.E. METHOD



Select your bespoke areas of your life (categories)



List your goal for each area of your life

*Ex: "Finance - I want to save enough money for a downpayment in 12 months"*



Describe the emotion you would feel by achieving that goal

*Ex: "I would feel proud, excited, grateful..."*

# ANALYZE

CURRENT STATE

## START

What can you **start** doing in each categories to get you *closer* to your goal?

## STOP

What can you **stop** doing in each category that is a time waster or is not productive?

## CONTINUE

What is working?  
What should you **continue** doing?

# PRIORITIZE

ALIGNING ON WHAT'S IMPORTANT



Determine the length of time it will take for each goal to be achieved or if there is a deadline associated with the goal



Rank each category goal by order of importance, determine which goal you start first



List everything that needs to be done to achieve each goal into milestones



# ENGAGE

IN THE WORK



**Accountability** - is key.

Block time in your calendar, find an accountability buddy



**Reward System** - For each milestone achieved on your journey



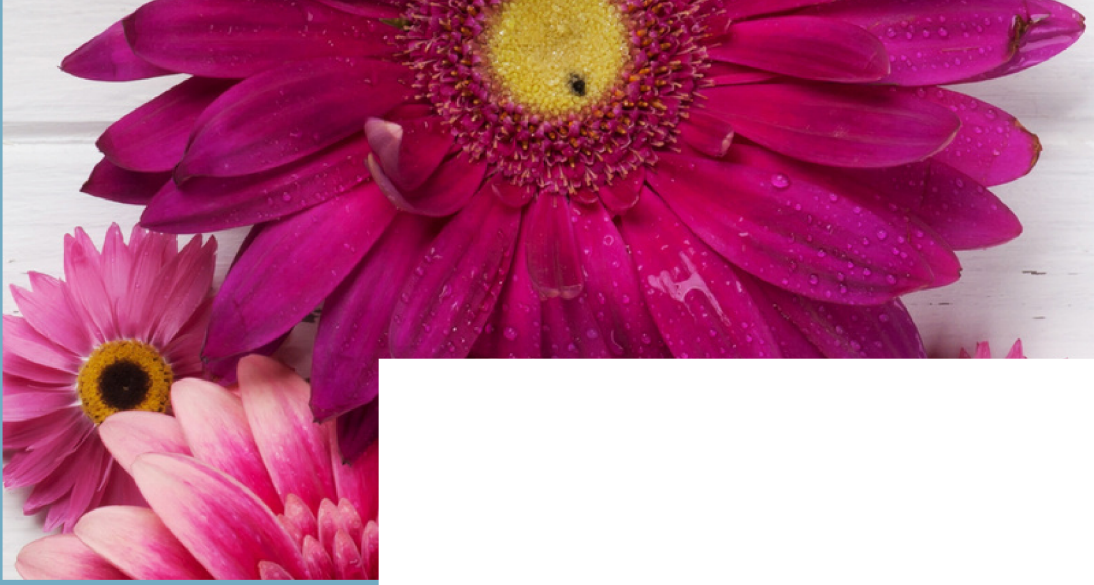
**Time Frame** - Commit to deadlines/due dates



BIG ASS GOAL DIGGER

# MODULE THREE

SMASH YOUR GOALS



# MODULE THREE

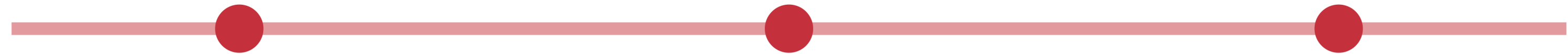
## INTRODUCTION

This is where the rubber hits the road!

In this module you will learn how to plan for your goals, ensure accountability and sustainability so you can SMASH your goals without compromise!

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# WHAT YOU'LL LEARN



SMART(IE)

Goals

CREATE

Your Goals

PLAN

for Success



# SMART(IE) GOALS



**S**PECIFIC

A successful goal must be specific. The more details you can include, the better.

**M**EASUREABLE

A successful goal must be measurable. Set milestones to track your progress towards your goal.

**A**CHIEVEABLE

A successful goal must be achievable to keep you motivated and on task. Be clear on how you will accomplish your goal + what is needed to achieve it.

**R**ELEVANT

A successful goal must be relevant to your overall desired accomplishments. Understanding the why behind your goal is crucial.

**T**IME BOUND

A successful goal must have a timeline or deadline so you can prioritize the order tasks need to occur.

**I**NDIVIDUAL

A successful goal must be individualized. This has to be your goal or dream to accomplish, not someone else's goal.

**E**NJOYABLE

A successful journey to smashing your goals is to ENJOY each task and milestone. Make planning the goal fun and reward yourself along the way.

# CREATE

## THE BLUEPRINT



**POST IT PARTY** - Create a visual wall with Post It Notes, each note represents a task to be done



**COLOUR CODE** - Each subcategory represents a different colour so you can easily identify the subcategory



**MILESTONES** - Determine what you need to in **X** number of months to achieve your goal

# THE POST IT PARTY



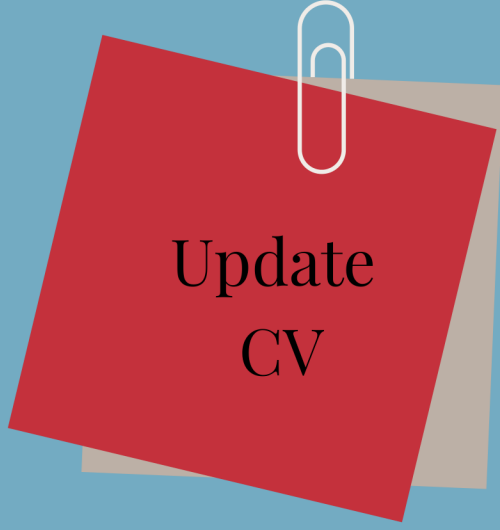
Career  
Promotion



Course or  
Accreditation



KPI's



Update  
CV



Find Mentor



Personal  
Brand



Memberships

# MILESTONES

AND MICRO GOALS

## Milestones

Separate each sub-category into "Milestones"



in chronological order, by month



Create 60 day action plan with 1st two milestones



# SHORT TERM GOALS

60 & 30 DAY PLAN

60

Create a list of everything you need to achieve in 60 days

Review list and prioritize what is most important based on timeline or relevancy to the goal

Highlight the items that need to be done first

30

Top priorities from the 60 day list become your 30 day plan

List every task that is required to accomplish your short term goals

Prioritize each task by order of importance (List 1-4)

# SHORT TERM GOALS

## Weekly Goals

Week One is identified as the most important tasks, repeat for each week



List each item to achieve by week and keep record of it's progress



Schedule all tasks into your calendar, with reminders

# SHORT TERM GOALS

## Daily Planning Tips

Set Reasonable Expectations



make it fun when possible and reward yourself to keep up motivation



Batch tasks together (emails, calls, errands, etc)

# MONTHLY REVIEW

STAYING ON TRACK

## Celebrate

Highlights of what you completed



Biggest Accomplishments this month?



Best Pro Tip you've learned for your playbook

## Review

Review any tasks not completed



Challenges, Setbacks or Roadblocks?



Any changes in direction to your goals?

## Pivot like Ross!

What do you need to start doing?



What do you need to stop doing?



What do you need to continue doing?



# MONTHLY

## REVIEW

Before moving forward, take some time to fill out the spaces on the page below to reflect on your goals, any progress that you may have made and the next steps you need to take to make those goals a reality!

*Main Goals*

*Progress Made*

*Next Steps*

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# REPEAT THE PROCESS



## WORKBOOK

- Use the workbooks provided to repeat the 30-60 plan
- Track your success for motivation
- Plan your rewards for milestones achieved



## "MINDSET IS LIFE!"

- Daily Affirmations
- Vision Boards + Vision Statements
- Pivot + Plan with Positivity



# SMASH YOUR GOALS



COMMIT  
TO YOUR GOALS



PLAN  
FOR SUCCESS



EXECUTE  
THE PLAN