

TWENTY TWENTY FOUR

WHOLISTIC WELLNESS CLINIC

# GOAL SETTING WORKSHOP

With Dr. CJ Cooper and Dr. Julie Emmert

Let's plan your best year yet!

2024 Goals of \_\_\_\_\_

# TWENTY TWENTY FOUR

## TO BEGIN: 2023 REFLECTION

Write down or circle the number that best describes how you feel about each part of your life in 2023 and then explain why you feel that way.

**MY BODY** I HATE IT 1 2 3 4 5 6 7 8 9 10 LOVE IT  
WHY? \_\_\_\_\_  
\_\_\_\_\_

**MY WORK / SCHOOL** I HATE IT 1 2 3 4 5 6 7 8 9 10 LOVE IT  
WHY? \_\_\_\_\_  
\_\_\_\_\_

**MY MONEY** I HATE IT 1 2 3 4 5 6 7 8 9 10 LOVE IT  
WHY? \_\_\_\_\_  
\_\_\_\_\_

**MY LOVE LIFE** I HATE IT 1 2 3 4 5 6 7 8 9 10 LOVE IT  
WHY? \_\_\_\_\_  
\_\_\_\_\_

**MY FRIENDSHIPS** I HATE IT 1 2 3 4 5 6 7 8 9 10 LOVE IT  
WHY? \_\_\_\_\_  
\_\_\_\_\_

**MY SELF-WORTH** I HATE IT 1 2 3 4 5 6 7 8 9 10 LOVE IT  
WHY? \_\_\_\_\_  
\_\_\_\_\_

# TWENTY TWENTY FOUR

## 2023 REFLECTION

Now that you've ranked how you feel in these categories, use your answers to help with the following questions:

- What are 3 good things that happened this year and how did they make you feel?

---

---

---

- What are 3 low points this year and how did you handle them?

---

---

---

- What is the big lesson you learned this year?

---

---

---

- What did you do this year that you are proud of?

---

---

---

- What are your hopes and dreams for next year?

---

---

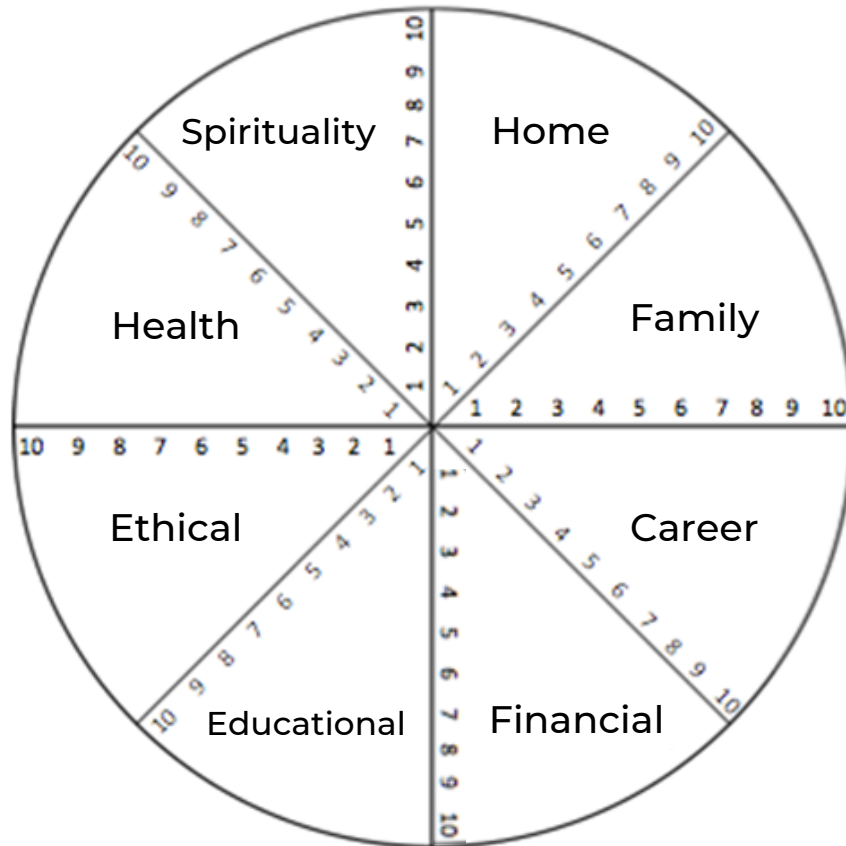
---

We are so glad you've joined us for WWC's 2024 Goal Setting Workshop! Let's plan your best year yet!

## TWENTY TWENTY FOUR

# 2023 MY WHEEL OF LIFE

IS IT BALANCED? WILL IT ROLL?



On the wheel above, rate yourself from 1 (poor) to 10 (excellent) in these 8 areas and then connect the dots.

1. **Health:** your relationship with your physical body, health and wellness.
2. **Spirituality:** your relationship with God or higher power.
3. **Home:** your relationship with your home, either physically or emotionally.
4. **Family:** your relationship with your immediate and distant family.
5. **Career:** your relationship with your job or business.
6. **Financial:** your relationship with money.
7. **Educational:** your relationship with school or continued learning.
8. **Ethical:** your relationship with self and morals.

# TWENTY TWENTY FOUR

## FACTORS OF CONGRUENCY INQUIRY

You, no doubt, have ideals, desires and non-negotiable values that you have adopted over the course of your life. These are uniquely dear to **your heart**. They should be identified to see if there is any emotionally congruent relationship among them. Write a very short description of what you can ideally visualize **HAVING** (within these values) for your life in each of these nine areas. Example A: I **VISUALIZE** having financial independence. I **VISUALIZE** having a family in which all are supportive of each other. Then prioritize, by placing a number in the categories of your life as it is **TODAY** with #1 being the most important and #9 being the least important.

HEALTH

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SPIRITUALITY

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

HOME

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

FAMILY

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CAREER

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

FINANCIAL

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

EDUCATION

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

ETHICAL

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

OTHER

I VISUALIZE HAVING... \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TWENTY TWENTY FOUR

# GOAL SETTING

Place the names of the highest prioritized categories of your life, as it is TODAY, in numerical order. Write the category name of your highest priority under the #1 slot, your second prioritized category in the next slot and so on. Then write in what you MOST want to have in those categories plus anything else that comes to mind. Start your sentences with "I want to-" An example is "I want to have financial Independence", "I want to have \$500,000 in a savings"

01

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

02

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

03

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

04

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

05

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

06

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

07

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

08

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

09

- A. I WANT TO... \_\_\_\_\_
- B. I WANT TO... \_\_\_\_\_
- C. I WANT TO... \_\_\_\_\_

# SMART GOALS

SMART goals help improve achievement and success. A SMART goal clarifies exactly what is expected and the measures used to determine if the goal is achieved and successfully completed.

## **A SMART goal is:**

**Specific (and strategic):** Linked to position summary, departmental goals/mission, and/or overall School of Medicine goals and strategic plans. Answers the question—Who? and What?

**Measurable:** The success toward meeting the goal can be measured. Answers the question—How?

**Attainable:** Goals are realistic and can be achieved in a specific amount of time and are reasonable.

**Relevant (results oriented):** The goals are aligned with current tasks and projects and focus in one defined area; include the expected result.

**Time framed:** Goals have a clearly defined time-frame including a target or deadline date.

## *Examples:*

### Not a SMART goal:

Employee will improve their writing skills.

Does not identify a measurement or time frame, nor identify why the improvement is needed or how it will be used.

### SMART goal:

Elaine has identified a goal to improve communications with the Premier Leaders of her Organization, by implementing a weekly Conference call. She will complete the list of Premier Distributor Leaders by January 15, 2015 and the Conference call invitations will be extended by January 25, 2015. Elaine will gather the names of those who agreed to participate and draft the final list for everyone by January 31, 2015. The calls will begin on the first Monday of February 2015 and weekly thereafter.

# SMART GOALS: HEALTH

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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



# TWENTY TWENTY FOUR

# SMART GOALS: SPIRITUALITY

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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

TWENTY TWENTY FOUR

# SMART GOALS: HOME

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_

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

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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

TWENTY TWENTY FOUR

# SMART GOALS: FAMILY

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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

# SMART GOALS: CAREER

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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

# TWENTY TWENTY FOUR

# SMART GOALS: FINANCIAL

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_

---

---

---

### Specific

- What is the desired result? (who, what, when, why, how)

---

---

### Measurable

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

---

---

### Attainable

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

---

---

### Realistic

- You should shoot for the moon but does the goal violate any physical laws of time or space?

---

---

### Time Certain

- What is the date you will achieve?

---

---

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

---

---

---

---

---

TWENTY TWENTY FOUR

# SMART GOALS: EDUCATION

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_

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

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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

# SMART GOALS: ETHICAL

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_

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

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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

# SMART GOALS: OTHER

Start With the Dream of What You'd Like to Achieve: \_\_\_\_\_

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

**Specific**

- What is the desired result? (who, what, when, why, how)

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

**Measurable**

- How can you quantify (numerically or descriptively) completion?
- How can you measure progress?

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

**Attainable**

- What skills are needed?
- What resources are necessary?
- Are you prepared to make the commitments necessary in order to achieve?

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

**Realistic**

- You should shoot for the moon but does the goal violate any physical laws of time or space?

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

**Time Certain**

- What is the date you will achieve?

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

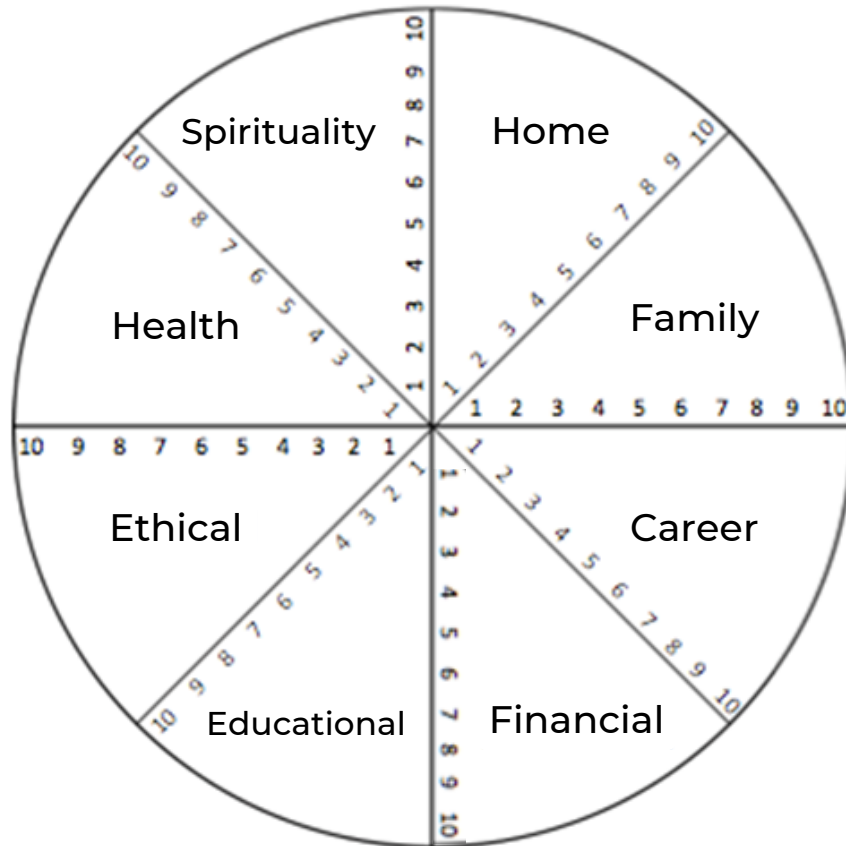
**Final Goal (Begin goal statement with "I'm so happy and grateful now that..." state goal in present tense: "I am.." "I have...", etc. and must include date goal will be achieved)**

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



# 2024 MY WHEEL OF LIFE

IS IT BALANCED? WILL IT ROLL?



On the wheel above, rate yourself from 1 (poor) to 10 (excellent) in these 8 areas and then connect the dots.

1. **Health:** your relationship with your physical body, health and wellness.
2. **Spirituality:** your relationship with God or higher power.
3. **Home:** your relationship with your home, either physically or emotionally.
4. **Family:** your relationship with your immediate and distant family.
5. **Career:** your relationship with your job or business.
6. **Financial:** your relationship with money.
7. **Educational:** your relationship with school or continued learning.
8. **Ethical:** your relationship with self and morals.

TWENTY TWENTY FOUR

# 2024 REFLECTION

- What SCARES you about the changes you want to make in your life?

---

---

---

---

---

---

- What EXCITES you about the changes you want to make in your life?

---

---

---

---

---

---

Additional Resources:

- Mel Robbins
- Brene Brown
- NeuroEmotional Technique at WWC
- Emotional Freedom Technique
- First Aid Stress Tool (FAST)

We are so glad you've joined us for WWC's 2024 Goal Setting Workshop! Wishing you the best year yet!

With love,  
Dr. CJ and Dr. Emmert