

## INTRODUCTION: Priorities, Goals, and Actions Alignment Worksheet

*(The Template Starts on the Following Page)*

### What This Is

Worksheets for personal use to capture critical goals; make sure your goals are prioritized so that your energy goes to what's most important; and develop personal action plans that align where you spend your time with what you identified as most important.

We've filled in a few worksheet cells to show how the content could play out for a Project Manager's particular career development goal.

### Why It's Useful

Because we're all too busy with too many competing demands on our time. If you step back and look at how you've spent your last 2 weeks, can you say for sure that your energy was spent on really important items—at home or at work?

This format was created originally as a personal tool—simple in concept and format but powerful if used consistently—to help make sure that question always gets answered with a “Yes.” The worksheets provide a means for keeping prioritized goals in front of us and driving our actions.

### How to Use It

**Identify Prioritized Goals:** Use the Priorities Worksheet to list current goals, challenges, issues, areas of concern, or opportunities, in order of decreasing priority to you. These can be personal goals, work goals, career goals, or a mix. Priority can be thought of as a combination of importance and urgency. To decide which are your top priorities, first list all of them and then decide where you want to focus most of your energy. Then choose where you would next focus if #1 were on track.

For each priority area, fill out the following:

- **Goal, Stated as a Desired Outcome.** Be Specific! What is it that you want to achieve?
- **Measure: What would be the observable signs of success?** Get very concrete about how you will know you've reached the goal.
- **Date: By when do you intend to accomplish this?** Give yourself a time goal to ensure action.
- **What, if anything, seems impossible about this?** Acknowledge the fears, risks, or barriers to achieving your goal. Then you can plan steps to overcome those obstacles.
- **What outcome would exceed your expectations, and surprise and delight you?** The biggest goals often yield the strongest motivation and action! Dream big and capture it to help drive bold enough action planning.

**Generate Ideas and Plans:** Use the **Ideas and Plans Worksheet** to brainstorm a list of 12 or more ideas or actions for each goal. Choose 1 to take action on for each goal. NOTE: Include wild and "impossible" ideas! Make sure your list includes at least one idea that would never work and another that you consider ridiculous; this way you can be certain you are not self-censoring your brainstorming.

**Act on the ideas, record progress, and assess your path:** Sit down periodically (at least every other week) to review your Ideas and Plans Worksheets and note your status through the task list. If you find yourself not making progress, ask yourself what's in the way. Have you set the wrong priorities? Are your goals not compelling enough to lead you to act consistently? Adjust your priorities, goals, and actions as needed.

***Develop the habit of keeping yourself focused on what's most important!***

The Template Starts on the Following Page

## Template: Priorities, Goals, and Actions Alignment Worksheets

What Timeframe Does This Cover? ☐ Week ☐ Month ☐ 3 Months ☐ 6 Months ☐ Year ☐ Several Years

**Priorities - List current goals, challenges, issues, areas of concern or opportunities in order of decreasing priority to you.**

NOTE: Priority can be thought of as a combination of importance and urgency. To decide which are your top priorities, first list all of them and then decide where you want to focus most of your energy. Then choose where you would focus next if #1 were on track.

<b>Priority</b>	<b>Goal, Stated as a Desired Outcome</b> <b>Be Specific!</b>	<b>Measure: What would be the observable signs of success?</b>	<b>Date: when do you intend for this to be accomplished?</b>	<b>What, if anything, seems impossible about this?</b>	<b>What outcome would exceed your expectations, and surprise and delight you?</b>
#1	Be seen as a business-savvy project manager who is capable of guiding front-end of critical projects.	Having my boss (Director) see me as able to speak for him in the business-requirements meetings at start of each project.	October 2006	I have trouble speaking up strongly when contentious trade-offs are being discussed.  I don't know how to learn the biz well enough to feel comfortable making big judgment calls	Being given a large release to manage next year.
#2					
#3					

*See next page for Worksheet for brainstorming ideas and actions for reaching the above goals.*

## Ideas and Plans Worksheets – Brainstorming

**Brainstorm a list of 12 or more ideas or actions for each goal. Choose 1 to take action on for each goal!**

NOTE: Include wild and "impossible" ideas! Make sure your list includes at least one idea that would never work and another that you consider ridiculous.

**GOAL #1 – Description:** Be seen as a business-savvy project manager who is capable of guiding the front-end of critical projects.

	<i>Idea or Action</i>	<i>Owner</i>	<i>Due Date</i>	<i>Status</i>
1	Request lunch with John – he is seen as superstar in terms of business-savvy. Find out how he learned it all and what makes him comfortable challenging VPs in public.	Me	April 15	
2	Request meeting with my boss to lay out my development plan – what must he see before he'd let me speak at the biz requirements meetings?	Me – ask Tom R.	April 20	
3	Talk to head architect – would he give me some tutorials on how the business priorities and architecture decisions interact?	Me	May 31	
4	Ask to sit in on Business Team discussions for Release X to see what kinds of tradeoffs they discuss for that large release.	Me	May 31	
5	Find a class on business requirements analysis for large interconnected programs.	Me	June 15	
6	Figure out how I can get some assertiveness coaching.	Me	June 30	
7	Identify how I can participate in business discussions, tradeoff analysis, decisions on the projects I'm assigned to.	Me	April 30	
8	"Ask for the Job 1" - have interim review meeting with my boss – has he seen progress, what areas need work, am I ready to handle the requirements meetings?	Me	August 1	
9	"Ask for the Job 2" - request meeting with my boss to ask him to support me in getting an assignment related to big release management next year.	Me	Ask by Sept 30 Meeting by Oct 31	
10				
11				
12				

GOAL #2 - Description

	<i>Idea or Action</i>	<i>Owner</i>	<i>Due Date</i>	<i>Status</i>
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

GOAL #3 - Description

	<i>Idea or Action</i>	<i>Owner</i>	<i>Due Date</i>	<i>Status</i>
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				