



LIBBY GILL & COMPANY

SUCCESS MADE SIMPLE

Annual Objectives & Actions Worksheet

This worksheet will help you identify your professional and personal objectives for the year, then prioritize them in a sequence that makes sense for you. Below are examples of objectives with some specific example to stimulate your thinking. Feel free to use these or create your own list, using terms that make sense to you.

Objectives

Examples of Professional Objectives

Leadership (Enhancing skills)

Executive Presence (Boosting confidence and visibility)

Skill-Building (Certifications, Training, Seminars)

Networking (Mentors, professional peers, conferences, events)

Team-building (Adding staff, growing current staff roles)

Job Change (Finding new role in company or moving to new company)

Start Business (Starting entrepreneurial venture)

Systems (Improving tech, financial, overall systems and procedures)

Examples of Personal Objectives

Fitness (starting new program, losing weight, eating better)

Family (spending more time with family, improving relationships)

Finances (get out of debt, retirement planning, college savings)

Romantic Partner (improve existing relationship, join dating site)

Quarterly Actions

Now, list specific actions under each quarter, making sure that each action is tied to an objective. For example, if you've listed "Increase Executive Presence," you may want to include "take a seminar" or "hire a coach." Slot that action into the appropriate quarter, based on your priorities, timeframe, budget, and anticipated opportunities. If it's an immediate, high-need activity, place in January or February. If it's a lower priority objective or one that makes sense to tackle later in the year, place it in Q2 or Q3.

Q1 - Examples

January

- Onboard new team member with business objectives, revenue goals, culture guidelines
- Complete 90-day plans with team members
- Finish leadership book proposal
- Conduct 2016 Vision Webinar x2
- Finish all course materials
- Continue 4xwk fitness program
- Start "clean eating" program
- Create Ted Talk

February

- Launch new YouTube channel
- Shop book proposal
- Update website

March

Q2

Q3

Q4