



# Visioning and Goal-setting... Essential Skills for Success

By: F. Scott Addis, CPCU, CRA, CBWA

Your ability to create visions and set goals is essential to your personal and professional lives. Visions allow you to see yourself at some point in the future, while goals offer a road map to reach these visions. There is nothing more rewarding than having visions, setting goals to reach these visions, and focusing in as the visions become reality.

## Goal-setting

Goal-setting is a powerful process of becoming clear about your ideal future, designing an action plan to get you there, launching into action and persisting until you reach your destination. The key to goal-setting is your ability to turn this vision into reality.

The art of goal-setting is understood and appreciated by top athletes, entertainers and successful people in all walks of life. A person who learns how to set goals lives each day with a sense of clarity, confidence, purpose and passion.

I was first introduced to the art of goal-setting in the early 1980s while maturing as an account manager at Johnson & Higgins in Philadelphia. Rather than seeing goal-setting as a chore, I learned that the process of goal-setting was stimulating, energizing and rewarding. Goal-setting made a lot of sense to me. Without goals, I would have no sense of direction.

The art of goal-setting will enable you to:

1. Decide what is important in your life.
2. Determine what you want to achieve.
3. Separate what is important from what is irrelevant.
4. Be motivated.
5. Facilitate your ability to benchmark progress.
6. Gain self-confidence as your goals become reality.

Think of goal-setting as your navigation system. Goal-setting allows you to identify what is important in your life and turn your thoughts and ideas into specific, actionable, and measureable goals. Importantly, your goals will protect you from becoming distracted by other people's agendas and expectations. In designing your goal-setting navigation system and charting your own course, you will have control over your destination.

Research on goal-setting and peak performance substantiates that most successful people are goal-oriented. They have learned how to turn their vision into action. They have a knack of bringing the future into the present so they can take action now. Greg Norman, the legendary golfer stated that "setting goals for your game is an art. The trick is setting them at the right level, neither too low nor too high. A good goal should be lofty enough to inspire hard work yet realistic enough to provide solid hope of attainment."

A common acronym for setting goals is **SMART**. The **S** stands for Specific. **M** is for measureable. **A** stands for achievable. **R** is for realistic. **T** stands for time-bound. Think of a goal as a dream with a timeline. Every goal needs a target date for completion.

If you do design **SMART** goals, do not lose sight of your "big picture" goals – your future vision. **SMART** goals can help you climb the ladder of success step-by step, only to find that it may be leaning on the wrong wall.

I would like to offer the following 5-step strategy for effective goal-setting.

**Step 1 – List your goals A to Z.** The art of goal-setting begins with writing your personal and professional goals from A to Z. Don't hold back. Write down whatever comes to your mind. Go nuts and take pride in the length and diversity of your list. This exercise will give you energy and motivation. It is also fun.

Some of your goals will be short-term while other will be futuristic. Don't worry about that. Just focus on writing down goals that are important to you. You may wish to ask yourself the following questions:

- What is my purpose and mission in life?
- How do I want to focus my time and energy?
- What are my developmental needs at this point in my life?
- What does my ideal lifestyle look like?

Your goals will cover a wide range of categories including family, career, education, financial, physical, spiritual, community service, etc. The A to Z exercise will allow you to establish a “big picture” of what is important to you and what you want to do with your life. Many of your A to Z goals will be “lifetime goals.”

**Step 2 – Prioritizing your goals.** After you have gone through the A to Z exercise, begin listing your goals on a scale of 1 to 10, with 10 being most significant to you at this point in time, and 1 meaning it is not a priority right now. Here are a few questions that should help you prioritize your goals:

- Which goal(s) will give me the most energy?
- Which goal(s) am I most committed to?
- What goal(s) offers the most value to me?
- What goals are fully within my control?
- In five years, how important will this goal be to me?

The process of prioritizing your goals will allow you to break down your A to Z list into smaller targets. You should gain greater clarity through this exercise.

**Step 3 – Setting your execution strategy and achievement timeframe.** By prioritizing your goals, you have set the stage for an execution strategy through which you are able to define the following plans:

- Lifetime plan
- Five-year plan
- One-year plan
- 90-day plan
- Weekly plan

Your lifetime and five-year plans represent your vision of the future – essential points of your long-term destination. These “big picture” plans are vital. However, it will be your ability to execute the weekly, 90-day and one-year goals which will launch you to your ideal future.

Your one-year goals should be power-packed, the kind that require you to stretch your capabilities, increase your resources, and make meaningful improvements to your personal and business lives. Your one-year plan should include meaningful, relevant, motivational, and realistic steps to your long-term vision. The 90-day plan supports the one-year goals – an essential means to benchmark your progress, reevaluate your priorities, and make sure that you are focused on what matters most. It is difficult to reach your one-year goals without 90-day plans.

As I look at my career, the weekly plan is an essential key to my success. I have made it a habit to come to work each week with a plan to accomplish specific objectives that support my 90-day and one-year plans as well as my “big picture” future vision.

**Step 4 – Visualization** – Mental imagery is essential to goal-setting. Your ability to see yourself at the point of goal actualization is a key component to successful goal-setting. Goal-setting breaks down unless you have great clarity about your vision.

**Step 5 – Goal Actualization.** When you achieve a goal, take time to enjoy the satisfaction of what you have accomplished. Celebrate the moment and absorb the implication of the goal as it relates to your future self. If your goal is a significant one, reward yourself appropriately.

On occasion, you will not accomplish a specific goal. You must not lose confidence or get frustrated. The failure to actualize a specific goal is not important as long as you learned a lesson from the process and gave it your best effort. Walter Cronkite once said, “I can’t imagine a person becoming a success who doesn’t give this game of life everything he’s got.”

### **Visioning**

Visioning is frequently used by athletes and entertainers to enhance their performance. It is the technique of using your imagination to visualize specific behaviors or events that you want to occur in your life.

Your performance will be greatly enhanced when you practice visioning as part of your personal development plan. Vision as if you’ve already achieved your goal. Remember, success begins within.

You may find the following five visioning exercises of great value.

1. **Internalization:** Close your eyes. See the goal in your mind’s eye. Practice “seeing” your goal repeatedly until it’s clear in your mind. For example, a golfer may visualize the perfect stroke over and over again to mentally train muscle memory.
2. **Externalization:** Imagine the situation when you’ve attained your goal, this time with your eyes open. Actor Jim Carrey wrote himself a check for \$10 million in 1987. He dated it in the future, “Thanksgiving 1995,” and added the notation, “for acting services rendered.” He visualized success for years and, in 1994, received \$10 million for his role in *Dumb and Dumber*.
3. **Anticipation:** Play out a whole scenario in your mind. Imagine how people are behaving toward you. Michael Jordan stated that he shot many more baskets in his mind than he ever did on the court. He mentally rehearsed what he intended to do...in his mind.
4. **Emotionalization:** Anticipate positive emotions when you achieve a goal. Sports psychologists say that visualization boosts athletes’ confidence by forcing them to picture themselves winning. It also helps them concentrate on their physical moves and how they feel when they win.
5. **Verbalization:** Picture your goals and rehearse the scenario you painted during your forecasting exercise. Say out loud what the scenario is that you see. Then write it down. Look at your goals again at the end of the six months.

Once you determine specific outcomes, visualize them over and over again with all of your senses:

- What do you see? (images and pictures)
- What do you hear? (the roar of the crowd)
- What do you feel? (kinesthetically how your body responds and feels)

Visioning and Goal-setting...essential skills for your success. The process will ignite your passion for the future!

#### About the Author

Scott Addis, CPCU, CRA, CBWA is the CEO of Beyond Insurance and is recognized as an industry leader having been named a Philadelphia finalist for *Inc. Magazine's* "Entrepreneur of the Year" award as well as one of the "25 Most Innovative Agents in America." Beyond Insurance is a consulting firm that offers leadership training, cultural transformation, and talent and tactical development for enlightened professionals who are looking to take their practice to the next level. Since 2007, the proven and repeatable processes of Beyond Insurance have transformed individuals and organizations as measured by enhanced organic growth, productivity, profitability, and value in the marketplace.