

Hello, I'd like to welcome everyone to our session today on "Creating a Personal Development Plan." Whenever it is that you're listening to and watching today's session, we are so glad that you've joined us.

Before I introduce our presenter and let her take it away, I want to mention a couple quick tools for you to help you make the most of this time that you have. If you take a look on the left-hand side of the screen, you'll see an "Event Resources" section. We've uploaded a copy of the presenter's slide deck. We've also got some great additional resources for you that we'll talk about a little bit later on. Those are all in PDF format, so you can download them at any point that you're listening to this session.

We also have an "Ask a Question" section. If you have questions on this particular topic, you're more than welcome to send us a question. We do receive those via e-mail, and we will go ahead and reply to those typically within a couple of days. I'll tell you a little bit more about that when we get to the end, but we do have that option for you as well.

We're very pleased to have Laurie Kovens presenting today's topic. Laurie is a Licensed Clinical Social Worker. She's been in practice since 1993, and she has served as a clinician in both medical and employee-assistance settings. She has worked with clients, families, community members, and coworkers to help them adapt in the face of ongoing physical, emotional, and organizational change—certainly something that ties into today's topic.

Laurie works with clients from a person-centered, strengths-based approach; and her treatment orientation includes short-term, solution-focused counseling, mindfulness, cognitive behavioral therapy, motivational interviewing, medical crisis counseling, narrative medicine, and spiritual and psychodynamic counseling.

In addition, she is also an NASW-Certified Clinical Supervisor and is currently pursuing her Master's degree in writing with a focus on narrative medicine. Laurie is a frequent presenter; and she focuses on the prevention and recovery from burnout, organizational management and development, resilience, and the use of writing and reflection for self-care and personal and professional growth—which is our focus today. We're thrilled to have Laurie presenting with us.

I'm going to go ahead and pass it to you, Laurie, so you can dive in and get us started.

Thanks so much, Katie.

Welcome, everyone. Thank you for taking the time to tune in. We often know the goals we want to achieve, but have difficulty understanding how to achieve those goals. In this session, you will have the opportunity to understand effective goal setting and identify potential obstacles that can create barriers to reaching your goals. You've already taken a first step today, which is creating a little bit of time to listen and reflect and think about this.

Our objectives today will be to recognize the importance of goal setting, identify the various types of goals, apply tips for setting effective goals, and identify obstacles and different types of motivation to help overcome those barriers.

Eighty percent of individuals never set goals for themselves. Consider the following:

Without knowing where you want to end up, how can you expect to get there?

Goals give a measure for success.

Goals can give you something to be accountable for.

Many people feel as though they're adrift in the world. They work hard, but they don't seem to get anywhere worthwhile. A key reason that they feel this way is that they haven't spent enough time thinking about what they want from life and haven't set formal goals for themselves. After all, would you set out on a major journey without an idea of your destination?

Probably not.

Goal setting is a powerful process for thinking about your ideal future and for motivating yourself to turn your vision of this future into reality. The process of setting goals helps you choose where you want to go in life. By knowing precisely what you want to achieve, you know where you have to

concentrate your efforts. You'll also quickly spot the distractions that can so easily lead you astray.

Why is goal setting important?

Goal setting is used by top-level athletes, successful business people, and achievers in all fields. Setting goals gives you long-term vision and short-term motivation. It focuses your efforts and helps you to organize your time and your resources so that you can make the very most of your life. By setting sharp, clearly-defined goals, you can measure *and* take pride in the achievement of those goals; and you'll see forward progress in what might previously have seemed to be a long pointless grind. You'll also raise your self-confidence as you recognize your own abilities and competence in achieving the goals that you've set.

Goal setting and planning helps you break down bigger goals into smaller steps, which can make longer, more daunting change feel more manageable, help you celebrate benchmarks along the way, keep you motivated, and keep your progress from being derailed by challenges or obstacles. Again, the reasons that goal setting is important include: long-term vision, short-term motivation, focus, organization, measurement, pride and progress, and self-confidence.

Analyzing your existing skills: while trying to identify the skills that you want to develop, it is also important to analyze your current skillset. This can also be done by making a list of your experiences and achievements up to this point, your stronger skills, your most enjoyable skills, and your weakest skills. Examine how you know these are your weakest skills. By doing this, you gain a realistic understanding of where you currently are in your skill development. It's a great exercise in recognizing your strengths, which helps with motivation, as well as helps you to focus on the tools you already have, also ones you need to further your goals.

Another way to think about the "weakest" skills are to think about these as areas to strengthen and grow into, whether in your knowledge base, your experience, or your level of comfort and mastery.

A SWOT analysis is a great way to do this. You can see here that this analysis involves both internal and external factors and looks at strengths, weaknesses, opportunities, and threats.

Examine your current situation:

What are your strengths?

How can you capitalize on those strengths and overcome your weaknesses?

What are the external opportunities and threats that currently exist?

Strengths are internal positive aspects that are under your control and upon which you can capitalize in planning. Those can include work experience; education, including value-added features; strong technical knowledge within your field; specific transferrable skills such as communication, teamwork, and leadership skills; personal characteristics, some examples of those include strong work ethics, self-discipline, ability to work under pressure, creativity, optimism, or a high-level of energy. Strengths can also include good contacts and successful networking skills and interaction with professional organizations.

Weaknesses are internal aspects that are under our control and that we might want to plan to improve. Those can include lack of work experience; low GPA or feeling like you were educated with the wrong major; lack of goals; lack of self-knowledge or lack of specific job experience or knowledge; low technical knowledge; weak, soft, or transferrable skills, including things like leadership, interpersonal communication, and teamwork; lack of job hunting skills; or negative personal characteristics such as poor work ethic, lack of discipline, lack of motivation, indecisiveness, shyness, or becoming too emotional.

Opportunities consist of positive external conditions that you do not control but of which you can plan to take advantage including positive trends in your field that will create more jobs; opportunities you could have in the field by enhancing your education; your field is particularly in need of your set of skills; opportunities you could have through greater self-knowledge or more specific job goals; opportunities for advancement in your personal life as well as your field; opportunities for personal and professional

development; career path you've chosen provides unique opportunities; geography; or a strong network.

I'd also throw in volunteer experience and pursuing other interests, since the topic here is setting personal goals as well as professional ones. Think outside the box. This analysis is often used in a workplace setting but can be as effective in setting and identifying your own personal goals.

Threats include negative external conditions that you do not control, but the effect of which you may be able to lessen. These may include negative trends in your field that diminish job opportunities, such as downsizing or obsolescence; competition of cohorts of college graduates; competitors with superior skills, experience, and knowledge; competitors with better job hunting skills than you may have at the time; competitors who went to schools with better reputations; obstacles in your way, including lack of advanced education or training; limited advancement in your field because advancement can be cutthroat and competitive; limited professional development in your field so it's hard to stay marketable; and companies not hiring people with your major degree or area of expertise.

Threats on a more personal level may include demands of your other roles at work or in your family; competing demands on your attention, such as a wide range of interests that compete for your time and attention; and some physical and mental health issues that can either temporarily or chronically disrupt or otherwise create some unpredictability in your life.

Let's go ahead and take some time to go through this exercise ourselves. Remember, this is a working document. The idea in our time together is to make a start on this SWOT analysis. As you continue to reflect, you may discover items you want to add in each of the sections; and your answers may change over time as you acquire new skills, discover new opportunities, discover growing areas or your knowledge base or trends in your field.

So let's start by drawing a large square on a blank sheet of paper. Divide the box into four squares and label each square with one of the following: strengths, weaknesses, opportunities, and threats. Start your SWOT analysis by entering *something* in each of the sections.

We're going to take a pause here. You're welcome to pause this presentation so that you can take all the time you need to complete your draft SWOT analysis.

[Pause]

After you've had a chance to complete that draft analysis, you can start to use that information to set what we call SMART goals. These are goals that we can use and that will really be effective. The acronym SMART stands for **S**pecific, **M**easurable, **A**ction-based, **R**ealistic, and **T**ime-specific. Let's look at the importance of each of these.

Specific: the goal must clearly state what is to be achieved, by whom, where, and when it is to be achieved. Sometimes it may even state why that goal is important. Not all of these questions will apply to every goal, but it is important to ask all the questions in order to assess how specific your goal is and make it as clear as possible.

Measurable: this often means it has a numerical value to it. Attaching a number or percentage to your goal to make sure you are meeting your benchmarks is important. Otherwise, we can never really know if we meet our goal and thus won't get motivated by accomplishing what we set out to do. One example is if you set a goal that you want to exercise more often, then you make it measurable by saying, "I want to exercise three days a week for 30 minutes." That way, you can track your progress and it doesn't feel like an all or nothing activity.

Action-based: this one I think is the one that is most often incorrectly interpreted. Everyone wants their goal to be, for example, "I will lose 10 pounds," or, "I will lower my cholesterol into a healthy range." This is not an action, but it's a result of your actions. It may be what you want to *achieve*, but it's not something that you can truly control the way you can control eating five fruits and vegetables a day or drinking eight glasses of water. So your goal may look like, "I will lose 10 pounds by eating fruit as snacks and by walking 45 minutes a day after work Monday through Friday."

It's important that your goal setting is realistic. When you start the process, remember that the goals you make today don't need to be the goals you hope to achieve in the next few months or years; especially if there's a gap between the goal and where you are right now. So make sure that the goal is realistic, something you're both willing and able to do. Do whatever is realistic for you at this moment, keeping in mind that you don't want to stay in the same place too long and lose your momentum or motivation.

Making your goal time-specific can help prevent a stalemate as long as you revisit your goals on a regular basis. Someone said, "A goal is a dream with a time frame to it." Simply deciding by when you want to achieve something can be a good motivator. It can prevent you from procrastinating because you know you are working to a deadline. Using all of these components in setting your goal will help you to be successful in creating the changes you desire.

We have a couple of different kinds of goals. The first one we want to discuss is outcome goals. These represent the desired results that you plan to achieve. They are the goals that have you thinking: I want to get better at blank, or I want to lose weight, or I want to improve my grades in school. An outcome goal is the end result of what you want; it's the big picture. While it's critical to more adequately define the exact outcome you desire, you can achieve an outcome goal without the exact details demanded by most goal gurus. How? By setting a behavioral goal. We'll discuss those next.

Long-term goals help you plan for your future. They can be as short as a year or as long as 20 years from now. Short-term goals provide you a sense of accomplishment on a regular basis. If *all* of your goals are long-term, then it's easy to become discouraged. Short-term goals help you to stay on track.

A couple of long-term outcome goals include:
"I want to own my own company in 10 years."

Short-term goal:
"I want to be promoted to manager by February 1st."

Behavioral goals are the daily mini achievements that move you towards your outcome goal. They are the goals that you suddenly *can* control, that you can guarantee reaching. These smaller goals are the building blocks of your outcome goals, and they *do* need to be specific...the more specific the better. You may have to hit several behavioral goals to achieve your outcome goal. Here are a couple of examples of how those two types of goals work.

Long-term example: "In three months, I will be doing cardio training three times per week for 40 minutes per workout."

Short-term example: "Beginning tomorrow, I will eat an apple with my lunch three days per week on Monday, Wednesday, and Friday."

Another example is looking at weight loss. If your outcome goal is to lose 25 pounds this year, we can break that down into behavior goals including: Consume no more than X calories a day, X number of calories per meal, with three small-calorie snacks per day.

Exercise 30 minutes a day.

Eat bread and red meat only once or twice a week.

Another goal could be: "Develop a stronger network."

Outcome goal would be: "Become better linked and networked."

Behavioral goals, the ones that you can measure to keep you on track, include:

Identify the people that can help and the people that can help me attend a networking friendly event.

Make one call each day with a networking intent.

A work-related outcome in behavioral goal setting includes: Making more sales at work.

Outcome goal: Get 10 new customers each month.

Behavioral goals:

Call five new clients before lunch and five after lunch.

Pass the new proficiency test for product knowledge by next month.

If you don't develop your behavioral goals, hitting your outcome goals becomes a matter of fate or fortune. The reason those behavioral goals are

important is that you never assume that you'll always be in the same motivated state of mind, that you'll always be on a goal high, or that you'll always remember why that outcome goal is important. Behavioral goals let you sneak up on and ambush your outcome goals. Set them right, work on them every day with purpose, and you'll hit that outcome goal.

Take a look at the survey pictured here. Let's test your knowledge on the difference between behavioral and outcome goals while following the poll. Katie will walk you through how to respond to the survey in the next slide; and remember, your responses are anonymous and confidential. We'll have another survey a little later in this presentation, and Katie will remind you how to walk through that as well.

Thank you, Laurie. I've gone ahead and sent the survey out to everyone listening in. So even though this isn't live, everyone who is listening can go ahead and participate.

Looking at this question..."I will spend 20 minutes on Tuesday brainstorming why I want to be a manager by February 1st." What type of goal is this? You've got four choices; so just a chance to kind of test your knowledge, reflect on what Laurie had just gone over. When you're done with that, you'll be able to see a survey picture, a graph, of everyone who has listened in to this webinar and where they have selected.

I will go ahead and close that survey and pass it back to you, Laurie.

Thanks so much, Katie.

And just to let you know, the answer to the survey is selection "D". "I will spend 20 minutes on Tuesday brainstorming why I want to be a manager by February 1st." That is a short-term behavioral goal that heads you in the direction of your larger long-term goal.

Let's take a crack at writing an outcome goal and writing down a behavioral goal that supports it. Again, this is not a pass or fail test. There's no wrong way to do this. The most important thing when we're getting used to these concepts is to practice them. So go ahead and write down one outcome

goal, and now write down one behavioral goal that supports your outcome goal.

Anyone who would like to share what they wrote down?

Katie, could you jump in and let us know how people can do that?

Certainly, what I would encourage you to do as you've taken this time to practice this is with someone in your life—perhaps it's a mentor or a colleague or a family member—as you're trying to make some of these changes and create your personal development plan, take a moment and share with them what you've written down. That will also help with the accountability piece.

Great. Thanks so much, Katie.

Now we'll look at obstacles. Remember that these are a natural part of the change process. When you anticipate obstacles, you are able to come up with strategies to overcome them. How you view obstacles is going to determine your ultimate outcome. Those who view obstacles as reasons to quit are ultimately going to be unsuccessful or at least slowed down in their goals. Those who view obstacles as an opportunity to learn and improve their strategies will ultimately be much more successful.

If you go back to thinking about your SWOT analysis, in that weaknesses or obstacles box, this will remind you of how to think ahead and plan for some of those obstacles and anticipate them. Think about an obstacle you've encountered that left you feeling like giving up. What are some of the ways that you were able to look at that as an opportunity, and what was the outcome?

Some personal barriers to growth include fear...and that can be fear of the unknown, that's something that we all encounter; fear that comes with stepping out of your comfort zone and feeling not quite as confident as if you were in an area where you really felt like you had all the skills and the confidence that you need.

Other barriers can include lack of motivation; contentment, which leaves us unmotivated to make change—again, that goes back to feeling comfortable in our comfort zone and not feeling particularly motivated to step out of that; skepticism, doubting that resources might help or that anything is worth changing; and lack of resources, missing some of the practical things like contacts, knowledge base, finances, or time to pursue your goal.

Fear, again, is one of the greatest barriers to growth and success. Some people are afraid to be criticized, where others are afraid of change. One of the most common types of fear is fear of failure. No one wants to fail at anything they do, but it does happen sometimes. You have to be able to pick yourself back up and try again. If you assume that this is going to be part of the process, it will feel less scary and less daunting when you do run into that challenge.

Lack of motivation: change and growth take hard work. It's not easy. Sometimes people just don't have the motivation to make the necessary change. What that might mean is that's not a change you need to make right now; the time isn't right, or there are other goals that are going to be more appealing and more motivating to you.

Contentment: if a person feels that they're okay with where they're at, they don't necessarily feel the need to change. People can also, again, be afraid of the unknown. They'd rather stick to their normal routine and what is comfortable. The unknown brings uncertainty, and people don't like uncertainty.

Skepticism: some people feel they won't be able to change, so therefore they see no reason to try at all. To them it would only cost them time, effort, and maybe even some money without yielding pleasing results.

Again, lack of resources includes personal and professional growth that require time and sometimes money. For people who don't have their specific resources, they may not be able to make change at that time; and that suggests that perhaps a goal could focus on growing those resources and filling in to give you more resources to move forward in other directions.

Currently, which of the following is your primary personal barrier? Again, we don't usually experience these one at a time. We often will experience several of these at a time; but usually, there's one or two that sort of dominate our decision-making and our feelings about setting goals and making change. So pick the one or two that feel the most relevant to you at this time.

Katie, go ahead and remind folks how to respond to the survey.

Sure thing...thanks, Laurie.

I've gone ahead and sent out that survey. Again, as Laurie said, kind of reflect on which one of these may be your dominant personal barrier at this time. Again, everything is anonymous. Once you've selected that, you'll be able to see where everyone prior to you who's listened to this session, kind of where they fit within these as well.

Let me go ahead and end that survey. Thank you, everyone, for taking that moment to reflect.

I'll go ahead and pass it back to you, Laurie.

Thanks, Katie.

Now that we've identified some of our obstacles, let's talk a little bit about how do we address them and overcome them. We're going to look at *extrinsic* motivation and *intrinsic* motivation.

Extrinsic motivation is working on a task even if we have little interest in it because of the anticipated satisfaction of some reward. Intrinsic motivation is engagement in activities that enhance or maintain our self-concept. There's no particular reward other than the interest and enjoyment that accompany those activities.

For instance, extrinsic motivation will drive people to do things for tangible awards or pressures rather than for the fun of it. When someone does something, they have to explain why they do it. If someone is being rewarded extrinsically for doing it, then they can rationalize to themselves

that they're doing it for that reward. In this way, rewards can *decrease* internal motivation as people work to gain the rewards rather than because they like doing the work or believe it's a good thing to do. In effect, extrinsic motivation can change our pleasurable tasks into less pleasurable work.

Intrinsic motivation, on the other hand, is when someone is motivated by their own internal factors as opposed to external drivers of motivation. Intrinsic motivation drives people to do things for the fun of it or because they feel it is a good or right thing to do or because it brings some personal satisfaction or fulfillment.

There's a paradox of intrinsic and extrinsic motivation. Intrinsic motivation—motivation that comes from within us—is a stronger motivator than motivation that comes from external sources. But extrinsic motivation can easily act to deflate that intrinsic motivation. Again, if our motivation comes from an internally-derived sense of satisfaction and fulfillment, that is sometimes easier to sustain; but, working with external motivation gives us something that we are required to respond to, usually in work life, but sometimes in family or personal life as well. And that can take things that usually feel pleasurable and enjoyable to us and reduce our motivation and make them feel a little bit more mundane or more like an obligation than a pleasure.

Motivation is usually complex, so any given task or project is going to involve several different types of motivation. You may love your work for its own sake; that's intrinsic motivation. But that doesn't mean you won't be put out if your monthly paycheck doesn't arrive or you're not recognized for the good work that you do, and those are extrinsic motivations.

Let's look briefly at some examples or sources of these different kinds of motivation. Again, extrinsic motivation comes from *outside* of an individual and could include sources like family and friends, coworkers and managers, and rewards or awards such as promotions, raises, and performance evaluations.

Intrinsic motivation is your internal "why." If you are successful in achieving your goals, how would your life be different? If you were successful in

achieving your goals, what would you be doing in those circumstances that you aren't now?

Additional helpful tips:

Write down your goals. It's really important to do this, and post those goals where you can see them every day. This will help you be more committed to the goal and allow you to renew that commitment each and every day. People who don't write down their goals typically do not achieve their goals.

Look at all of the goals that you've written down; sort them by order of importance; prioritize them. The most urgent goals should be focused on first, and those of lesser importance can be accomplished once the others are met. How many times have you given yourself a to-do list and found there are some things that you would rather not do even though they're important or pushing them away will result in some consequences? We all do it. So it's really useful not just to write down your list of goals but to sort them by order of importance.

Next, be sure to define a time span:

When do I want to start working towards this goal?

When do I want to have it achieved?

Remember, use your priority list to help you sort that out so that you can stagger your goals and not overwhelm yourself by expecting you to work on *all* of them with the same amount of energy, all at the same time.

Lastly, keep a journal of your progress including successes, problems and solutions, new ideas and opportunities, and results. This helps you reflect; adjust your goals, your expectations, and your action steps as you go.

Remember, it's *really* important to celebrate and reward yourself when you reach your goals. So when you've achieved a goal, including an interim goal that may be part of a larger end goal, take the time to enjoy the satisfaction of having done so. Absorb the implications of the goal achievement and observe the progress that you've made towards other goals as well. If the goal is a significant one, reward yourself appropriately. All of this helps you to build self-confidence, stay motivated, and remain focused.

You may even in your goal planning process want to plan for what some of those celebrations and benchmarks, acknowledgements can be. One of the traps in pursuit of goals or making changes is that when we get to a benchmark, we say, "Okay, now I can have a day off from X activity," or, "I can slack off." Make sure that the rewards that you give yourself for achieving your goals, even if they're short-term goals, are ones that are not going to take you off track from any routines you've developed or your pursuit of your longer-term goals.

Final suggestions:

If you achieved a goal too easily, make your goal harder. Set the bar a little higher and remind yourself of your ability to reach the goals that you set.

If the goal took too long to achieve, make the next goal a little easier. This is not settling; it's just helping you make progress in a way that makes sense for you at this time. That's going to continue to move you forward. It will increase your motivation and allow you to build your goals with a higher and higher bar each time.

If you learned something that would lead you to change other goals, do so. Despite achieving a goal, if you noticed your skills declining or it feels unsatisfying to you, go ahead and reflect and decide whether to set goals to correct this versus set new goals that make more sense for you.

Remember, achieving goals involves change; and change is a process. Your circumstances, resources, time, and even your overall goals may change. The most important part of achieving goals is to understand that this is an ongoing process. The additional resources in the PDF attachments to this webinar include an illustration of this process of change to help you better understand the stages involved and how to apply your goal-setting process and your next steps. Those resources will also include links to worksheets, apps, and videos that provide additional tools and details related to our discussion today.

Katie will have some more information for you about how you can use your Employee Assistance Program to explore additional resources and support. Thanks, everybody, for starting with the important first step of taking some time to listen and reflect. Take care.

Thank you so much, Laurie.

Let me go ahead and do a couple of wrap-up items and let you know where you can get some additional resources. But I do want to thank Laurie for her time and expertise and walking us through a lot of great information. Just know that you'll be able to listen back to this presentation at any point.

Also, in the "Event Resources" section on the left, not only do we have a copy of Laurie's slides here but those additional resources that Laurie mentioned. You can download those at any point in time.

We do also want to remind you that your EAP; we are here for you 24 hours a day, 7 days a week. There are a variety of resources that we can provide you; not only if there are personal things going on in your life, or work, whether it's some counseling, maybe you have a grief or a bereavement situation you'd like some assistance with, or child care, elder care. So many different resources that we can assist you with at no cost to you. So please reach out to us.

We also have resources specific to developing goals. Perhaps you may want to see about locating some resources for a coach to kind of come alongside you. So give us a call 24 hours a day, 7 days a week. If you do not have your EAP-specific contact information, reach out to your Human Resources Department.

We do also want to provide you with an opportunity if you'd like to ask a question on this topic, you can use that "Ask a Question" box on the left-hand side of your screen. Simply type that in and then click "Send." We'll receive that via email, and we'll reply to you via email typically within a couple of days.

It's not a live situation, so I do want to remind you again that your EAP...we're for here for you 24/7. So as soon as you're done listening to this, you can pick up the phone and call; so just wanted to remind you of that.

Finally, when you log off now there will be a brief survey. So we'd appreciate you taking a moment to go ahead and let us know your feedback there.

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We certainly wish you well in your personal development and your goal setting and professional development going forward. Thanks again to Laurie for sharing her time and expertise. And everyone take care.