



Empowering people  
Launching ideas

# GOAL PLANNING WORKSHEET

This goal-setting worksheet should be completed by the mentee with support from their mentor in the early stages of the relationship.



## STEP 1

### BRAINSTORM

From long-term goals to micro goals, take five minutes of your first goal-setting meeting for the mentee to brainstorm any and all goals that they can think of for themselves and their business.

## STEP 2

### PRIORITIZE

Discuss each of the goals listed in terms of being S.M.A.R.T. (Specific, Measurable, Attainable, Realistic, and Time-based), and prioritize which to formalize in the plan.

Consider three kinds of goals:

#### 1. MICRO-GOALS:

Short-term and/or daily goals that are attainable by relatively low commitment and deliver rapid results. Micro-goals lead to the development of new habit-forming behaviours that strengthen personal and entrepreneurial skill sets. For individuals with mental health challenges, micro-goals are typically the most realistic, manageable, and encouraging.

#### 2. REACH GOALS:

Generally medium-term goals that require significant investment of time and energy to reach. Reach goals tend to transition from a focus on skill development to business development.

#### 3. BIG PICTURE GOALS:

Longer-term aspirational goals that can be aligned to the mentee's overarching vision for their business. While typically less specific and time-sensitive than other goals, big picture goals should still be measurable, attainable, and realistic, and are best informed by the accumulation of micro- and reach goals.



## DEFINE & REFINE

Use this chart to outline and prioritize your goals.  
Complete a separate PDF for every additional goal.

<b>DATE:</b>	
<b>COMPLETED BY:</b>	
<b>GOAL:</b>	
<b>MENTEE ACTION PLAN</b>	
<b>MENTOR SUPPORTS</b>	
<b>LEARNING/ BUSINESS OPPORUNTUNITY</b>	
<b>RISKS/ CHALLENGES</b>	
<b>BENCHMARKS</b>	
<b>TIMELINE TARGETS</b>	

# TRACK YOUR GOALS

Use this sheet as a template to guide a consistent goal tracking discussion at each meeting. Replicate the table for every additional goal being tracked.

<b>DATE:</b>	
<b>DATE OF LAST UPDATE:</b>	
<b>GOAL:</b>	
<b>PROGRESS UPDATE:</b>	
<b>WHAT'S GOING WELL:</b>	
<b>WHAT CHALLENGES HAVE YOU ENCOUNTERED:</b>	
<b>WHAT TASKS/ BEHAVIOURS CAN YOU FOCUS ON THIS MONTH?</b>	
<b>HOW CAN YOUR MENTOR BETTER SUPPORT YOU IN THIS GOAL?</b>	
<b>HOW HAS THE TIMELINE FOR THIS GOAL BEEN AFFECTED?</b>	
<b>IS THIS GOAL STILL A PRIORITY?</b>	