



# GOAL SETTING CHEAT SHEET

...for setting better goals

Hi, I'm Sarah Olivieri. I help nonprofit leaders increase capacity, deliver better programming, bring in more money, and make the world a better place.

I do this through the Impact Method™, an operating framework for nonprofits and mission driven businesses, which I deliver through private client work and the **THRiVE program** for smaller nonprofits.

The goal setting cheat sheet you now have in your possession will help you gain focus and momentum!

Also... I want to hear about your results, so email them to me at [sarah@pivotground.com](mailto:sarah@pivotground.com)

*Sarah Olivieri*

# PART 1:

## Goals come in pairs!

Here's the problem with most goal setting advice... most advice talks about setting "a" goal, when **the reality is that most goals come in pairs**. So if you've struggled with setting or achieving goals in the past, it may be because you only set up half of the equation!

A goal pair has one goal for **the action YOU are going to take** and another goal for **the result or the outcome** that you are hoping your actions will have, but that you don't have direct control over.

**Here's what you need to do from now on:**

**FIRST:** Identify the outcome or result that you desire. Describe that outcome and get clear on how you will know if it's achieved. Will the world work differently? Is there a numerical result that will measure success?

**SECOND:** Identify your goal for the action you will take. Describe the action goal and get clear on what the definition of done is.

## Examples

### OUTCOME

**Goal description:** Loose weight  
**Definition of done:** I am 10 lbs lighter

**Goal description:** Increase the number of active donors supporting my nonprofit  
**Definition of done:** The number of donors giving at least once a year increases from 235 to 350

### ACTION

**Goal description:** Change my diet  
**Definition of done:** 90% of my eating has been on my new diet for 3 consecutive weeks and I feel confident I have established a new habit

**Goal description:** Hire a copywriter to write new messaging  
**Definition of done:** New messaging is in our communications materials and being used

**For each goal in the pair:**

1. Describe the goal as clearly as you can.
2. Define done by adding some metrics to use as benchmarks for success or what the future will look like that will indicate this goal has been achieved.

**OUTCOME**

**Describe the goal:**

**Definition of done:**

**ACTION**

**Describe the goal:**

**Definition of done:**

# PART 2:

## Assess your goals with this checklist:

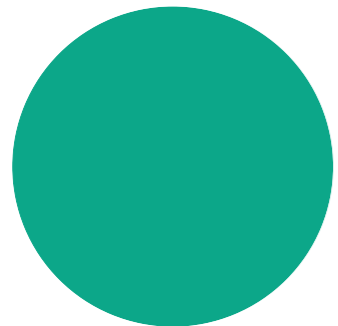
- \_\_ How will achieving this goal actually help move us forward?
- \_\_ What secondary impacts will achieving this goal have?
- \_\_ Is this really the best way to achieve the desired impact?
- \_\_ What happens if we don't do anything?
- \_\_ How important is it that we work on this goal now?
- \_\_ What would happen if we waited on this goal?
- \_\_ What assumptions are we making?

- \_\_ Would our results be better on this if we had something else in place already?
- \_\_ Are we sure we will have buy-in from the people we will need help from in achieving this goal?
- \_\_ Do we have the resources (money, time, expertise) in place to accomplish this goal now?  
*If so, is working on this goal the best use of those resources?*  
*If not, are there some initial steps we should be taking to acquire those resources?*

# PART 3:

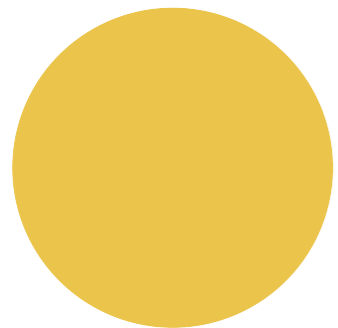
## Are you in the RED, YELLOW, or GREEN zone?

When you start going through the checklist in Part 2 for all of your goals, I want you to keep an eye out for patterns that will give you clues about where you really need to focus your overall strategy.



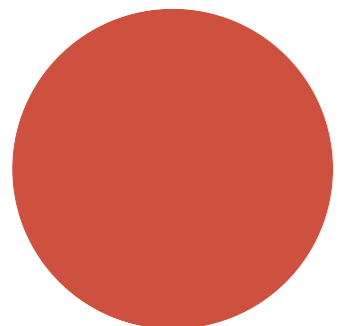
### **The GREEN Zone:**

You're in the GREEN Zone if the checklist questions are easy to answer with certainty and the last 3 questions are a No, Yes, Yes. Proceed with your planning!



### **The Yellow Zone:**

You're in the Yellow Zone if the checklist questions are easy to answer with certainty and the last 3 questions are NOT No, Yes, Yes. You are struggling with capacity issues. Focus your goals on building capacity (time, money, and/or expertise) and seek outside help sooner rather than later.



### **The RED Zone:**

You're in the RED Zone if you have a hard time answering the checklist questions with certainty and the last 3 questions are NOT No, Yes, Yes. You need to STOP setting goals and seek outside expertise to help ASAP.



# GET HELP!

## If you are in the RED or YELLOW Zones...

When you are in the RED and YELLOW zones, **time** is not your friend. The sooner you take action the more money you will save, the less time it will take to get you back into the green, and the sooner you will be relieved of the anxiety and overwhelm that you are inevitably experiencing.

More often than not, our approach of pairing proven frameworks with targeted coaching and consulting is just what people and organizations in the RED and YELLOW zones need to get into and stay in the GREEN!

So if you are in the RED or YELLOW zones, or worried that's where you are heading, then let's talk!

Schedule a free consultation call now at [www.pivotground.com/apply](http://www.pivotground.com/apply)