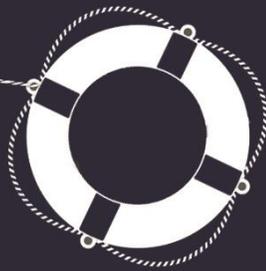


M E R E D I T H M O O R E C R O S B Y

GETTING UNSTUCK



A GUIDE TO MOVING YOUR
CAREER FORWARD



GETTING UNSTUCK WITH YOUR GOALS

2019 Goal Setting Workbook

“An army of sheep led by a lion can defeat an army of lions led by a sheep.”- Ghanaian Proverb

Whether you discovered my new book, *Getting Unstuck: A Guide to Moving Your Career Forward*, the Getting Unstuck with Meredith Moore Crosby podcast or we met at a speaking engagement, I’m glad you are here. Getting Unstuck isn’t just a magical formula that can get you tons of success for none of the stress. **It’s a guide to understanding how to move you from where you are to where you know you can go and to teach you how you can bring others with you.** This workbook will help you put into practice the lessons, advice and tools in *Getting Unstuck: A Guide to Moving Your Career Forward* to understand where you need to focus your limited energy and time.

In my time in corporate America, I learned from many mentors, got way more experience than I bargained for, and decided for myself what needed to focus on in order to grow. And at the end of it all, I had a set of steps that were a recipe for success—for growth, for vision, for achieving meaningful goals. Together, I call them TRIBE.

TRIBE is a methodology you can use to keep your goals and vision a priority. It is a simple reminder, a structure to protect you from falling into bad habits. At its base level, it's also an acronym:

TIME

RESOURCES

INNOVATION

BELIEF

EVOOLUTION

Each of these components is key to your professional journey.

TRIBE will help you recognize when something is wrong. It will help you adjust, to stand up for yourself, and know when it's time to leave a position. With it, I believe you can escape toxic cultures and navigate changes both inside and outside of corporate America.

Throughout this workbook, I will prompt you to check in with yourself. Keeping track of your thoughts in a single place will allow you to see your progress and identify when and where you might get stuck. Setting personal goals will boost your self-confidence, make your life's journey rewarding, and help you fulfill the purpose of your life. Get a notebook and turn the page.

You're about to get unstuck.

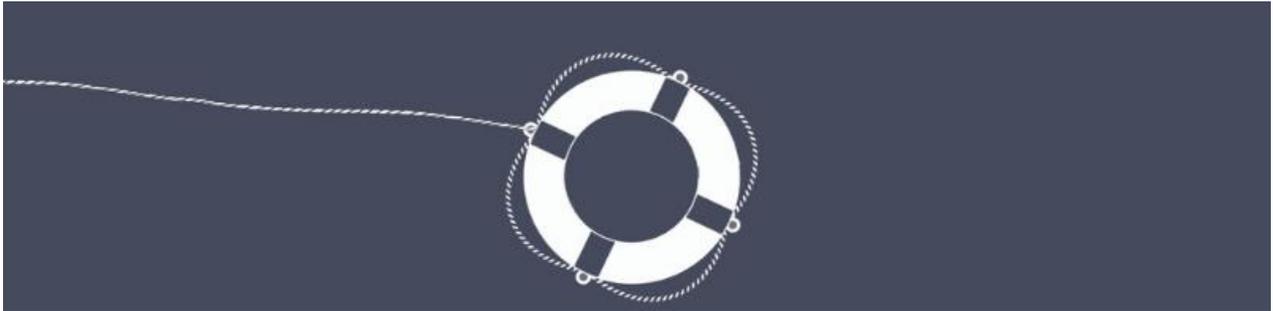


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A NOTE BEFORE YOU START.

Did you know less than 30% of people write their goals down but people who do see a fivefold increase in achieving their vision?

My clients love this workbook as a companion to *Getting Unstuck: A Guide to Moving Your Career Forward*, but they always have the same complaint—they can't do it all. At first glance this workbook might be overwhelming but don't give up. Over the next few weeks we'll walk through this page by page together.

This is about you writing down what you want out of life. Before you get started ask yourself three simple questions:

- What worked well last year and helped me achieve my goals?
- What did not work well and made me wish I made a different choice?
- What's one goal that I want to recommit to in 2019?

By taking a moment to reflect first you can focus your mind on where you might want to focus as you move through the exercises.

This workbook is not designed to measure or push you it's meant to help you see the gaps in your current plan, where you might have a blind spot or be undervaluing yourself.

- Don't get discouraged if you can't set a goal in every area or if you have goals that don't quite fit.
- DO adjust the workbook as you need! You are the only one of you. I recommend creating a bullet journal to track your goals in a way that fits your life style.

SETTING PERSONAL GOALS AND SEEING THEM THROUGH – WORKBOOK

- Visit GettingUnstuckGuide.com for updates on how to use this workbook to stay on track for your best year yet.

I'm here to help!

Meredith

GETTING STARTED:

SEE YOURSELF DIFFERENTLY

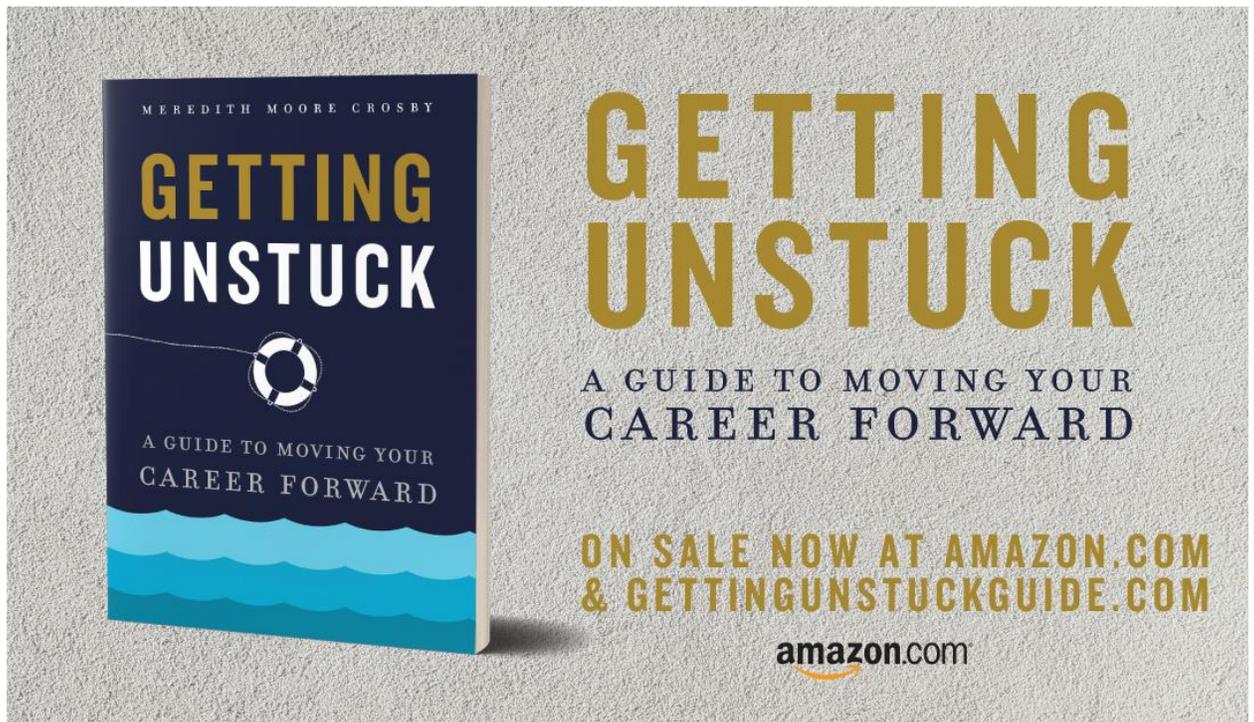
In today's workplace, many employees are not getting the management, training or mentorship that used to come with higher titles and greater responsibility. Women, especially women of color don't have access to the role models in the C-Suite and can start to believe it's not possible to break the glass ceiling. Only one in five C-suite leaders is a woman, and only one in twenty five is a woman of color. Without the resources to attend conferences and professional development she's missing valuable opportunities to build a network and a brand.

It's important for me to work with women who are setting goals for career advancement because as I understand how hard it is to overcome the time obstacles and the importance of feeling like you belong at work. I limit my client list to allow one on one connection and I record a weekly podcast to answer questions from listeners about mentors, sponsors, and executing new ideas. This workbook is one tool, I look forward to sharing more with you on your journey to getting unstuck!

Before you get started you should know:

- I love creating programs and as a communications professional, I offer clients a technology friendly platform to connect.
- To get the most out of working with me join the LinkedIn group and subscribe to Getting Unstuck with Meredith Moore Crosby on Soundcloud or Apple Podcasts.
- You'll receive weekly updates from me with reminders and tools to keep you on track.

This is your year, I'm here to help. I love helping people who are stuck to find the inspiration and strategy to move forward. I've been doing it for over ten years in America's largest companies, each year I add more tools to my tool box. Now that you are on the list, you'll receive the latest in your inbox!



An excerpt from *Getting Unstuck: A Guide to Moving Your Career Forward*.

When I first met Kelly, she had the longest tenure in her department. She was hired straight out of college, before she married or had kids. But, as she got older, everything in her life grew up except her career. Kelly was good at her job, of course, but she wanted a promotion. She applied for professional development programs and positions in other departments and even shadowed leaders to try to break the glass ceiling. She knew all the logistics of her job, like the best way to get corporate to approve a budget overage. She was efficient

and detail-oriented, keeping track of all the little things that might slip another employee's mind. But even though her company was struggling to keep top leaders—they hired new managers every few months—Kelly's name never came up for promotion, and all her applications were denied.

It's important to discover what you really want. For example, Kelly discovered that she was chasing the wrong dream. She thought her dream was to do her best in her job. However, she found out that advancing to the next level and expanding her impact was her true goal. Reflect well on your dreams and desires to discover your true goals.

BE SPECIFIC

Journal prompt: What challenge are you dealing with right now in your career?

According to McKinsey & Company and Lean In's women in the workplace report, women are underrepresented at every level, and women of color are the most underrepresented group of all, lagging behind white men, men of color, and white women. ¹What part of your job do you complain the most about?

Your goals are about more than you. Gender diversity is a business priority and you and your goals are a critical step to holding leaders accountable for results starting on what you need.

As women in the workplace, we are told anything is possible and that if a woman hasn't done it yet, then we can be the first. But even if we can see the next step, in reality there are still unwritten rules that can make it impossible to reach it. Kelly tried to be open to feedback, but no matter how much here

¹ The Women in the Workplace study 2018 by McKinsey & Company and Lean In, women of color includes Black, Latina, Asian, American Indian or Alaskan Native, Native Hawaiian, Pacific Islander, or mixed- race women. However, due to small sample sizes, reported findings on individual racial/ethnic groups are restricted to Black women, Latinas, and Asian women.

performance improved and how much she supported her manager, no one was willing to let her move forward in her career.

During management meetings, Kelly's managers said she was too caught up in office politics. They said she was aggressive, bossy, and too focused on promoting her own brand. They said she wasn't a team player and that she was determined to lead even when it wasn't her place. Finally, they suggested she didn't have the time to improve her management style because of her responsibility at home as a mother of three young kids.

Set your goals as one specific desire. For example, saying that you want to be make more money is vague. Saying that you want to expand your role by managing a strategic partner or project is more specific.

Write down your specific goals below:

Health: _____

Stuck? Consider: *Lose ____ pounds by _____.*

Career: _____

Stuck? Consider: *Research the best five best self help books in your area of expertise and read ____ each ____ beginning _____.*

Education: _____

Stuck? Consider: *Research the five best programs for my area of interest including application deadline and budget by _____ date.*

Family Relationships: _____

Stuck? Consider: I will cook and prepare meals at home with my family ____ nights of the week.

Relationships with Friends: _____

Stuck? Consider: *Establish rotating date schedule for parent-child dates by _____.*

Love Relationships: _____

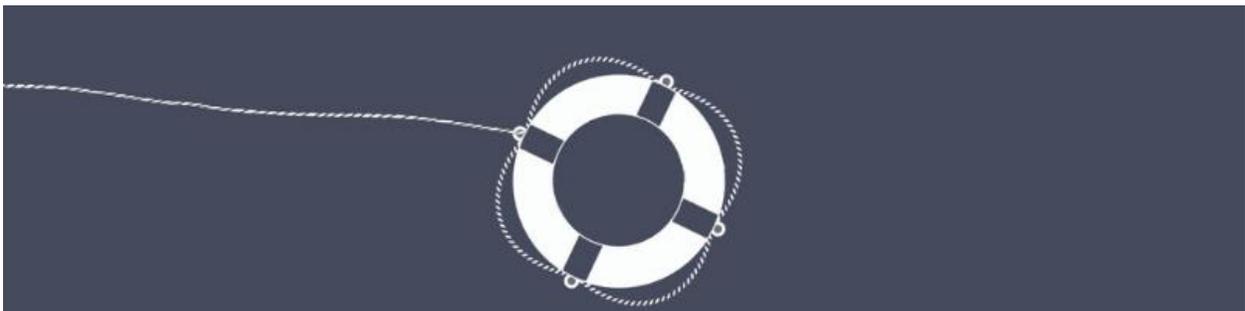
Stuck? Handwrite a note every _____ (day of the week), for 52 weeks beginning on _____.

Finance: _____

Stuck? Consider: Start saving \$_____ each month toward your next vacation beginning_____.

Spiritual: _____

Stuck? Consider: Meditate at least _____ minutes at the beginning of each day starting_____.



What additional areas of your life need to be included in your plan?

Bonus: For one week give yourself time and space to notice all of the areas of your life. Give yourself time away from everyone else’s expectations. Clear your calendar and get off social media. Before I told anyone about my new plan or what was next, I started by checking in with myself.

Passion Project: _____

Stuck? Consider: *I will launch my _____ by _____ .*

Work Life Balance: _____

Stuck? Consider: *Leave the office by _____ to have enough time for _____ with the kids starting _____.*

SET MEASURABLE GOALS

Working with my coaching clients, I've noticed a trend—high performing leaders are self-aware and constantly check and adjusting their course. Selected leaders view their role like a captain. Their role is to show up at their best to help guide the crew and passengers to safety. One person can't do it all, and the captain has to navigate the cockpit equipment, weather, and any unforeseeable events that can quickly turn disastrous. By having access to a map, they can more easily judge when they need to speed up, change course or refuel. After I decided I wasn't happy in my job I took a week to figure out what it was I really wanted, and I experienced what life would be like when I was truly in charge.

To prevent procrastination, think in terms of a specific number. You set big goals, now let's get specific and put a number on it. For example, instead of saying you want to get more sleep, what is your target bedtime and when will you start holding yourself accountable to be in the bed by that time? **Write your measurable goals below:**

LIFETIME GOALS

You are making awesome progress! You've looked at different areas of your life and now you get to take a step back and think big. Step outside of your career, achievements, and even your family responsibilities. For one week, give yourself time away from everyone's expectations to consider what could be possible. Dividing your life into sections helps you see your goals more clearly and where you need to direct your energy first.

You'll tackle one goal per day for next few days. Brainstorm what you want and respect your time to be thoughtful about your future. **No one will care more about your life than you do.**

Look at the various areas of your life: career, financial, education, spiritual, family, relationships, and artistic and determine the lifetime goals for each that are important to you. Next, break these goals down into smaller goals, which will make them more achievable.

YOU HAVE TO PARTICIPATE IN YOUR OWN RESCUE

If you want to stay motivated, determine your goals for yourself, instead of letting others decide how you should live your life.

SETTING PERSONAL GOALS AND SEEING THEM THROUGH – WORKBOOK

Reach for goals that are suited to your abilities and circumstances. Make a note, below, of any limitations that may cause you to make adjustments as you go along.

SET A DEADLINE FOR YOUR GOALS

Setting a deadline for your goals is essential. Determine how long it will take to achieve a lifetime goal, then decide how much you'll achieve in shorter time periods. Decide on intermediate goals for a year, six months, and one month out, then jot down deadlines for your lifetime goals. Consider the deadlines for your employer and plan ahead to be prepared for any performance conversations this year! If you are an entrepreneur try tagging your goals to three month quarters commonly used to share business updates.

Quarter One: January, February, March

Quarter Two: April, May, June

Quarter Three: July, August, and September

Quarter Four: October, November, and December

CAREER:

Long Term Goal: _____

Intermediate Goals:

One year: _____

Six months: _____

One month: _____

FAMILY RELATIONSHIPS:

Long Term Goal: _____

Intermediate Goals:

One year: _____

Six months: _____

One month: _____

RELATIONSHIPS WITH FRIENDS:

Long Term Goal: _____

Intermediate Goals:

One year: _____

Six months: _____

One month: _____

LOVE RELATIONSHIP:

Long Term Goal: _____

Intermediate Goals:

One year: _____

Six months: _____

One month: _____

FINANCE:

Long Term Goal: _____

Intermediate Goals:

One year: _____

Six months: _____

One month: _____

SPIRITUAL:

Long Term Goal: _____

Intermediate Goals:

One year: _____

Six months: _____

One month: _____

PASSION PROJECT:

SETTING PERSONAL GOALS AND SEEING THEM THROUGH – WORKBOOK

Long Term Goal: _____

Intermediate Goals:

One year: _____

Six months: _____

One month: _____

WORK LIFE BALANCE:

Long Term Goal: _____

Intermediate Goals:

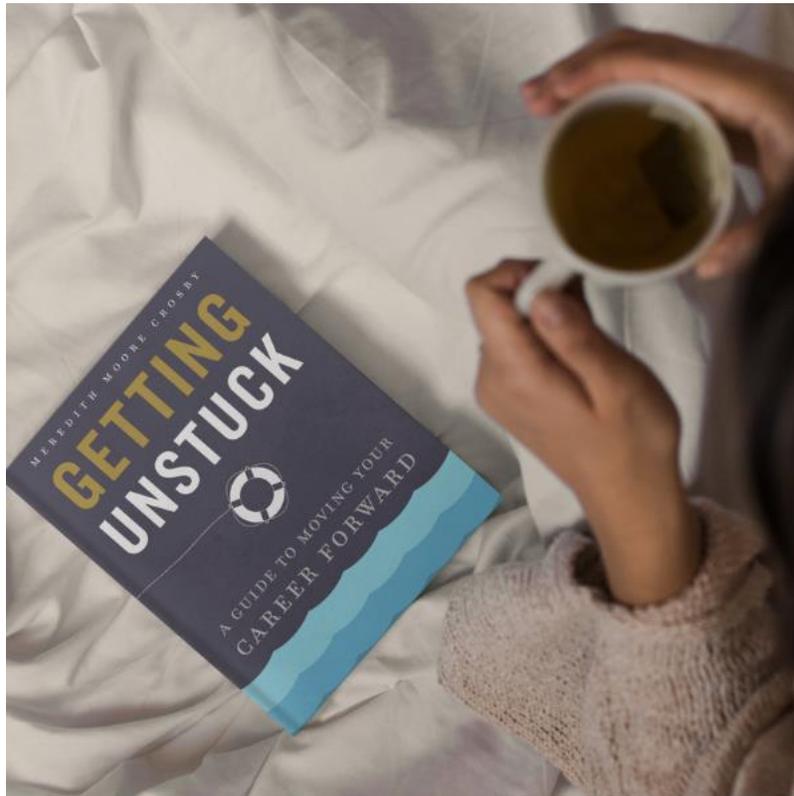
One year: _____

Six months: _____

One month: _____

A note from Meredith:
Use this section to clarify and record your milestones.
Next, we'll walk through the steps to achieve your goals.
If you are feeling stuck, set up your complimentary session and refer to the exercises in week one on the membership site, learn more at **GettingUnstuckGuide.com!**
You are doing it! Keep going!

PLAN YOUR DAILY ROUTINE



Decide what common tasks you'll do every day towards the attainment of your goals. You'll find it helpful to write down your goals and prioritize them. Jot them down in order of importance.

1. _____

SETTING PERSONAL GOALS AND SEEING THEM THROUGH – WORKBOOK

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

HELP WITH SETTING GOALS

Answer the following questions honestly. Include the challenges involved, if any.

1. How balanced is your life? _____

2. Do you have a sense of purpose? What is your purpose? _____

3. Are your thought and behavior patterns supporting a happy, successful life? _____



EVOLUTION

Evolution has been a hugely important theme of my life. However, it's not just change for the sake of change. Evolution is about making an impact clearly apparent in the world. It's about creating lasting change in yourself and in your environment.

Let go of old goals in favor of ones that better fit the current circumstances of your life. Review your goals as you progress and make room for changing priorities. Keep track of limiting beliefs and how you adjust your goals to evolve with your vision.

SETTING PERSONAL GOALS AND SEEING THEM THROUGH – WORKBOOK



WHAT DOES SUCCESS MEAN TO You?

Learning to make smart decisions, improving over time, and making tomorrow better—for me and for other people—are what drive me. And in my experience, this desire is one of the few that could be called universal. **Every person and every culture is different, but one constant that holds them together is this drive for constant improvement—it crosses races, religions, countries, and any other barrier (real or imagined) that you can think of. It is the primary force behind all change large and small.**

Before you determine your goals, answer the following questions:

1. What is your definition of success? _____

2. How does your definition of success affect you and your loved ones?

3. What will your life be like once you've achieved your goals? _____

Action item: Take your saboteur quiz and understand how your strengths could be working against you when you are under the stress and pressure of leadership.

SETTING YOUR COURSE

Understanding where you are stuck means taking an honest look at yourself for habits that could prove detrimental to the achievement of your goals. List these habits below and the steps you can take to change them:

IT'S UP TO YOU

You are the master of your fate and the captain of your soul. It's up to you to determine what you are willing to accept. Even as I applied for my first job in corporate America I was talking myself out of going for the job. What if the next job isn't better? What if it's not worth it? These frantic what-ifs, if I'd followed their nervous cautions, could have prevented me from taking a huge leap forward in my life. When it comes down to it your success is up to you.

To keep you motivated write the story of your year as if it's December 31, 2019.

What goals did you achieve and how?

What sacrifices did you make and how did they contribute to your success?

What past experience or motivation helped you push through

What do you wish you would've skipped?

What would you do if you had the chance to do it all over again?

Who are the main characters in your story?

What's the greatest challenge you had to overcome?

This is your safe space to clearly write the vision for your future. Visualize the outcome of working on your goals regularly to give them an added strength. When you see your future self, what do you notice about your appearance? Give yourself space to think about what you physically want to be different in one year.

This page is here for you!

Use this space for goals, ideas and thoughts that don't quite fit anywhere else. Draw pictures, sketches and anything that helps you make this workbook work for you!

START WITH YOURSELF

Your goal should motivate you to push through challenges, so you stay on course and excited through the finish line. Consider scheduling an appointment with yourself quarterly to review your goals. **Remember to reward yourself whenever you reach a milestone.**

SHARE YOUR STORY

Your goal is important and you will need help. Explain your goals to those who may be involved in making them happen. This is a great time to review with your mentors, sponsors and advisors to tell them what you need from them so they can support you.

To help you use your time and resources wisely, think of your mentors as the people with similar career paths who can provide relevant advice. Advisors are people who may be outside of your company or industry but can influence your career. Sponsors are likely in your organization and can directly advocate for you. Many leaders agree sponsors are the most critical because they have power to impact promotions, hires and project assignments. Still stuck on mentors, advisors and sponsors? Google Carla Harris, Vice Chairman of Morgan Stanley, she has a great TED Talk on the topic!

Make a list of people including mentors, advisors and sponsors likely to contribute to the attainment of your goals and specify how they'll contribute:

BE PREPARED FOR SETBACKS

If it was easy everyone would do it. Evolution is about moving from where you are to where you want to be. You can't do it alone. Pay attention to who is trying to guide you to the next level.

Be prepared to encounter discouragement and jealousy from others. Overcome negative thoughts and experiences by regularly visualizing the success you're after. **If you are feeling stuck, refer to the lessons in week two of the online materials for support, affirmations and tools to overcome setbacks.**

TAKE YOUR TIME

One of the most important parts of bringing your beliefs to work is recognizing when it's time to let go. You are making big decisions, give yourself the grace to take it slowly so you have time to balance the other important things in your life.

By not overcommitting yourself and prioritizing what you will do first you'll be more stress-free, and you'll have the time to make adjustments if required. Plus, you'll be able to savor each little victory along the way.

WHO CAN HELP YOU?

Congratulations! You made it through the Getting Unstuck workbook and are on your way to a better year! How do you feel? Take time to celebrate creating the space and finding the energy to reflect on what you want. After all, if you don't set your course, who will?

On your heroic journey of achievement, you might find yourself going off track. If that happens remember: use your words to help yourself see these moments as breakthroughs not breakdowns. Give yourself permission to change your course.

FOCUS ON YOUR FINISH LINE

Simply following others goals and trying to make others happy may work in the short term, but if you truly want to change your life or your workplace culture for the better, lip service isn't enough. It is absolutely essential that you be genuine in living your beliefs in the workplace. Being a leader means believing you can set enough of an example that your colleagues follow your lead, even when it means making difficult decisions.

Remain focused on your goals, no matter what situations you face. If you do lose sight of your goals, have a conversation with yourself about what's realistic to help you get back on track quickly and learn from your mistakes. The best defense is a good offense, prepare for what could throw you off course by listing the situations likely to distract you from your goals, and how you can overcome them:

BUILD YOUR COMMUNITY TO STAY CONSISTENT

You'll make success more likely if you choose the company of people who share the same goals. You'll keep each other motivated and celebrate each other's victories along the way.

A note from Meredith:

I help women get the courage to do what they want. If you are feeling like the “only” in your workplace, circle or environment, join the Getting Unstuck LinkedIn group and sign up for group coaching to build a supportive community and continue the conversation. To find it by searching for “Getting Unstuck with Meredith Moore Crosby” and include “goals workbook” in your request

Being different at work can be isolating and deciding to get unstuck can help you see where you need support to move forward and leave old habits and beliefs behind you. Changing cultures in our workplaces and our world start with research to understand and practice the best practices that are helping advance diversity globally.

Start With Research

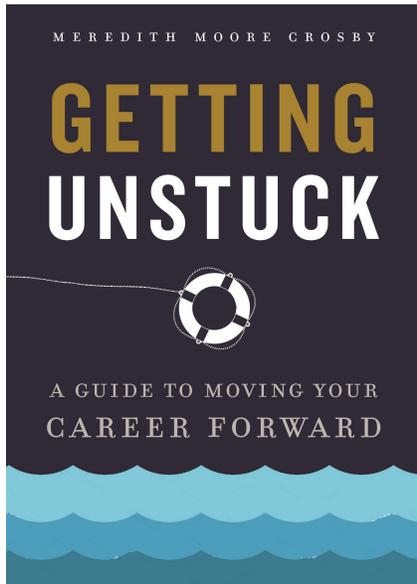
According to McKinsey and Lean In: “Being the “only one” is still a common experience for women. One in five women says they are often the only woman or one of the only women in the room at work—in other words, they are “Onlys.” This is twice as common for senior level women and women in technical roles; around 40 percent of them are Onlys.”

For more research on how your workplace can support your goals visit:

<https://womenintheworkplace.com/>

Before you go, take the Getting Unstuck pledge.

- 1. I am doing the work to live the life of my dreams.**
- 2. I am proud of myself and all I’ve accomplished.**
- 3. I am becoming the person I was meant to be.**



To get your copy of *Getting Unstuck: A Guide to Moving Your Career* and learn how you can work with leadership coach and author, Meredith Moore Crosby, visit GettingUnstuckGuide.com/community.

Thank you for completing this workbook, if this tool was useful please comment, like and share to help someone else find what worked for you. If you'd like to send a recommendation to be included in future marketing and advertising, email INFO@LEVERETTEWEEKES.COM.

PROGRESS REVIEW FORM

For one on one coaching appointments visit LeveretteWeekes.com

Name: _____

1. **What goals have I achieved this month?**

2. **What goals are still unmet at the end of this month?**

3. **What goal will I tackle next month?**

4. **What is working in the coaching sessions?**

5. **What is not working in the coaching sessions?**

6. **What would make the sessions better?**

Use this form to prepare for your one on one sessions with your coach. Complete and share for accountability and tracking of your goals.