

goal planning template - for personal or organizational aims

To achieve a goal or a vision you must plan and do what will enable and cause it to happen. This is usually several things, in steps. Plan by first clarifying your aim, then work backwards identifying the factors which will enable and cause achievement.

Level 1 - Your Aim Define your aim clearly. Attach measures to prove it is achieved. Commit to a timescale.

My aim/vision/goal:	Measures:	Timescale:

Then ask yourself and identify: What factors would directly cause the aim to be achieved? Insert them below.

Level 2 - Direct Cause Factors Identify realistically the factors which would cause your aim to be achieved. If necessary research these. Attach measures and timings. Add more rows if required.

Factors which will cause the aim to be achieved:	Measures:	Timescale:
1		
2		
3		
4		
5		

Then ask yourself and identify: What factors will enable the above to happen? Insert them below.

Level 3 - Enabling Factors Identify the factors which will enable the above causal factors to happen or exist. A causal factor might depend on more than one enabling factors. Insert or remove rows and use colouring or numbering to link factors between levels as you wish.

Factors enabling the level-two causal factors:	Measures:	Timescale:
1.1		
1.2		
2.1		
2.2		
3.1		
3.2		
4.1		
4.2		
5.1		
5.2		

When you have created your plan implement it by working upwards through the levels from the bottom to the top. Adapt your plan as required - especially add new factors as you discover them, and plan how each can be achieved by incorporating causal and enabling factors into this model. If necessary add a fourth level. If you wish, develop this outline planning method using [project management](#) tools, such as Critical Path Analysis, or a Gantt Chart, or other computerized systems. More help for using this tool and for goal planning generally is at the [Businessballs goal planning page](#), where you'll find both pdf and working file doc versions of this tool.