

# SMART & HAPPY

## Goal Setting Worksheets

*By Jonathan Fotos*

If it is to be successful, your health and fitness program must start with setting goals. In fact, I believe one of the top reasons people struggle with achieving their goals is that they set the wrong ones.

I mean that in the broadest sense possible. They could have been goals that simply didn't make any sense given where you were in your life. They could have been goals you really didn't care about, not really. Maybe you thought you should care, or worse, someone else thought you should, but at the end of the day, it wasn't important enough. Or, maybe it was important enough, but you just hadn't thought it all the way through, to get down to the true motivation underlying those goals.

That may sound like a bunch of psychobabble, but it's actually much more straightforward than that:

***What*** do you want to accomplish, and ***why***?

You already do this, you are already wildly successful in doing difficult things day in and day out, week after week, with a relentless focus, either because you really care about achieving some positive outcome, or you really care about avoiding the negative consequences of falling short.

You go to work every day. Maybe you love your job. Maybe you love being able to pay the mortgage. If you have kids, you take care of them *because it's that important to you*.

I've been through this, long before I made fitness a career. I spent over 30 years as a consumer of fitness, not a provider. Working in an office, pursuing fitness goals that didn't make sense, struggling to find something that would work, no matter how many failed diets or disappointing workout routines I tried.

And that's how I developed the SMART & HAPPY goal setting system. While it will require some thought, time, and work on your part, at least you can skip the 30 years of floundering around! And while I will be asking you to think deeply about motivations, and what it is you really care about, the entire process is anchored firmly in reality.

You're simply answering the questions of ***What?*** and ***Why?***

This first set of worksheets is an abridged version of the first two sections of what will be appearing in my upcoming book, "Feel Better, Get Better, Live Better. The What? Why?"

When? and How? of Achieving Your Health and Fitness Goals, No Matter What Your Age, and No Matter What Your Circumstances.”

We'll start with the SMART goals, which have been around for years, and are used across many disciplines.

We'll then move on to my proprietary “HAPPY” goals. This will be when we start digging deeper into what you care about.

Finally, we'll spend some time examining whether the goals work well together and try to eliminate any conflicts between and among them.

If you need additional assistance, be sure to visit my web site at:

<https://www.jonhealthandfitness.com/motivational-coaching.html>

There I describe the services and resources available to you, many of which, like this package of worksheets, are completely free and without obligation.

And of course, keep an eye out for my book mentioned above.

Finally, if you have any questions, I would be happy to answer them. Just email me at:

info@jonhealthandfitness.com

Thank you so much for taking the time and trouble to download this package and check out my SMART & HAPPY Goal Setting System. No matter what you end up deciding to do, or what program you end up pursuing, best wishes and good luck.

Remember, you don't need a miracle. There's nothing miraculous about setting and achieving difficult goals. You already do it all the time!

*DISCLAIMER: Jonathan Fotos is not a doctor, registered dietician or medical professional of any kind. While he is a certified, licensed, and insured fitness professional, nothing in this document should be construed as medical advice or specific advice of any kind. Your health is a very personal thing and even a doctor would take care not to suggest that a general document can speak to your personal needs and circumstances. These worksheets are only intended to get you to think about what it is you want to achieve. Before embarking on a diet or fitness program of any kind, you are encouraged to check with your doctor first, and seek care and advice as you deem necessary. You should also fill out a PARQ (Physical Activity Readiness Questionnaire) to flag any additional risks or problems you may have.*

## SMART Goals

You may already be familiar with SMART goals, it's a concept used across many industries with some variations. In fitness, a SMART goal is generally considered to be one that meets the following criteria:

### Specific

Expect to use a number here. "Lose weight" isn't specific, "Lose 10 pounds" is.

### Measurable

The goal must be able to be objectively verified using an instrument of some kind, whether it be a scale, measuring tape, stop watch, and so on.

### Attainable

Your goals must be reasonably achievable. "Losing 50 pounds in a month" is unlikely (and possibly unhealthy), while losing 5 pounds isn't.

### Realistic

The goal must be one you can reach given where you are, and the effort you are willing and able to expend. If you are in the midst of a project at work putting in 80-hour weeks, training for a marathon is probably out, but training for a 5k might not be.

### Timely

Your goal should have an expiration date in the sense that you are shooting to achieve it at some specific date in the relatively near future. Wanting to lose 20 pounds "someday" means you never really fail, but then you never really succeed either. Wanting to lose 20 pounds in three months on the other hand will hold you accountable to a time frame.

# WORKSHEET 1

List no more than three SMART goals. Then check each to make sure they meet the five SMART Goal criteria.

## SMART Goals

Goal #1 \_\_\_\_\_

Goal #2 \_\_\_\_\_

Goal #3 \_\_\_\_\_

	Goal #1	Goal #2	Goal #3
<b>Specific?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Measurable?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Attainable?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Realistic?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Timely?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## HAPPY Goals

SMART goals are critical. Any gym you walk into or just about any personal trainer in the industry is going to talk to you about SMART goals. That's because they work, to an extent. They are objectively quantifiable and will hold you and them accountable.

That said, there is also a sterility to them. A coldness. Are you really passionate about losing three inches from your waist, or adding five inches to your chest because you have an enduring affinity for prime numbers? Probably not. You want to lose those inches because you want to alter your appearance, to look "better." Or to fit in your clothes more comfortably. You want to add five inches to your chest because you want to be stronger or just fill out a shirt.

These are HAPPY goals. They are subjective, vulnerable to wishful thinking and rationalization, and the myriad other reasons why trainers hate it when you walk into a gym and say you want to "be healthy."

But that's what you really want. We want to define that a little better, but those are things you care about and to ignore them is to ignore the real reason you showed up!

So, what criteria do your goals need to meet in order to be considered HAPPY?

### Honest

You must be prepared to abandon self-judgment. here No one is listening. You can be as selfish, narcissistic and as shallow as you want. You want to look better in a bathing suit? You want to beat the annoying co-worker the next cubicle over in the company 5K? You simply want to be able to roughhouse with your grandkids, so you can be considered the "cool grandma," go with it. And keep in mind, this is not pure narcissism, this is using narcissism as a tool to a better end. Better health. Better company. Better employee.

### Affirmational

If we're being honest (And we are because we just said we would be!), we all either seek out, or at a minimum find pleasure in, receiving affirmation from others. But more importantly, that affirmation needs to align with our self-image. You have a view of yourself, partly formed by the way you want to be seen. The "energetic one," or the "strong one," or the "flexible one" and so on. Aligning your goals with that self-image goes a long way in increasing your commitment and motivation.

### Passionate

Any goal you settle on has to be one you truly care about, that will get you to walk by the platter of bagels at the morning meeting and grab a handful of blueberries instead. It has to be the one that when your alarm clock goes off at 5:30 AM you get up because it is

that important to you to achieve that goal. If you are not passionate about it, it's the wrong goal. And it doesn't have to be monumental, you just have to care about it.

### **Perpetual.**

While short-term goals can be useful as those little victories can inspire you to keep at it, ideally, they should be viewed as milestones on the path to something more long-term. If all you want is to lose a few pounds for some upcoming event, and plan to abandon that goal once that date has passed, this seems like an awful lot of preparatory work for a temporary change. Certainly, you can do this, and I'm not going to tell you that you shouldn't, but that is essentially pre-planned yo-yo dieting (and exercising), and not what this process is about. It also sets you up for what is essentially certain failure in the sense that a short-term goal means exactly that. If you have no plan beyond the short-term goal, you'll start reverting to your pre-goal state almost immediately. Let's go for the long term.

### **Yours.**

The goals you set must be yours. You must take full ownership of them. They cannot be someone else's. Not a friend's goal, not a family member's goal, not a colleague's goal, and certainly not a goal that someone on TV said you should have.

For a goal to be motivating it has to be personal, it has to have a direct connection to you at some deep level.

### **Process Goals vs. Outcome Goals**

One other important thing before you move on to Worksheet 2 and establish your HAPPY goals, and this is where I depart from much of mainstream motivational coaching protocol:

I don't much like "process" goals.

A process goal is an action, such as, "go to the gym three times a week." I concede that in some areas this could be useful, and it is often presented as a way to provide people with a feeling of accomplishment.

And I think that's where the trouble begins as it muddles the distinction between activity and achievement, like the boss who has a three-hour meeting and considers that progress when in fact nothing of any importance was decided or accomplished. It was just motion without purpose.

I address the actions you need to take in the "How?" section of my upcoming book and in my motivational coaching services, but it's more than just semantics. You can't establish a process until you know what it is that process aims to accomplish.

So, let's decide what we want to accomplish!

## WORKSHEET 2

List no more than three HAPPY goals. Then check each to make sure they meet the five HAPPY Goal criteria.

### HAPPY Goals

Goal #1 \_\_\_\_\_

Goal #2 \_\_\_\_\_

Goal #3 \_\_\_\_\_

	Goal #1	Goal #2	Goal #3
<b>Honest?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Affirmational?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Passionate?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Perpetual?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Yours?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## WORKSHEET 3

### Harmonizing your SMART and HAPPY goals. They should play well together!

Here you are looking only at how your SMART Goals work with your HAPPY goals. Ideally you will have some obvious matches, say, a SMART goal of “Losing 3 inches from my waist” and a HAPPY goal of “Slim down.” It won’t always be that clean, but that’s what you’re looking for.

You also want to make sure there are no obvious conflicts, say, a SMART goal of “adding 50 pounds to my bench press,” and a HAPPY goal of “Run a marathon.” Chances are, those aren’t going to work well together. Nothing can be ruled out, and you are welcome to try, but you need to think carefully about these. Again, this is purely an exercise of comparing SMART goals to your HAPPY goals. We’ll look for other conflicts in Worksheet 4.

List your SMART and HAPPY goals from the prior worksheets and use the remaining space to work it out as you see fit.

**SMART Goals**

**HAPPY Goals**

## WORKSHEET 4

### **Eliminate Conflicts, whether SMART, HAPPY, or both!**

So, great, your SMART Goals line up well with your HAPPY goals. However, you're not quite done yet. You still need to make sure there are no internal conflicts among your SMART and HAPPY goals. That is, you could very well have a SMART Goal of "Add five inches to my chest," and a HAPPY goal of "Muscular upper body." So far so good. And you could also have a SMART goal of "Increase shoulder range of motion by three inches," and a HAPPY goal of "Master Hatha yoga." Those two work together too. But does the first pair of matching SMART and HAPPY Goals work well with the second pair? I can't say for certain, it's something you'd have to determine, but that's definitely worth further exploration and perhaps a rethink of what it is you care most about.

In the space below, write down all your goals whether they are SMART or HAPPY and work out the conflicts as you see fit! If you don't think there are any, great, or if you identify something a little sketchy, make some adjustments. These are your goals, after all.

## WORKSHEET 5

### The WHY? Worksheet

Write down each of your SMART and HAPPY goals and list at least one reason “Why?” that goal is important to you. If you like, you can pair up your SMART and HAPPY goals if they match well (“Lose 3 inches from my waist” and “Slim down.”) and list one reason Why? For each pair. It could simply be to look better, or you just want the defined waist you use to have when you were younger, or you think getting some weight off will help your knee pain. Whatever it is, remember, this gets to the very heart of your motivation. These are the reason or reasons, you’re going to succeed.

**SMART and HAPPY Goals**

**Why?**

**Congratulations! You've just established goals you care about and that you will find motivating and important.**

You're not completely done yet, of course, but you are well on your way!

Any questions, shoot me a note at:

info@jonhealthandfitness.com

And take a look at my Motivational Goal Setting Services at:

<https://www.jonhealthandfitness.com/motivational-coaching.html>

There is a lot more to this process, of course, and I can help if you like.

Thanks again, and I hope to hear from you one way or the other!

Jon

