

My Roles and Goals: Who do I want to *be* in life and business?

Identifying the different roles we play in our life and setting measurable goals for each role gives us direction and ensures our efforts are being channelled into worthwhile activities.

This worksheet will help you clarify what you need to do in each of these roles to be successful. It also provides us with a valuable evaluation tool, so we can see how far we have come in our leadership and personal development journey and consider “where to now?”.

Step 1 – *Identify our Roles*

Identify 6-10 meaningful roles you play in your life (eg. parent, business person, lover, adventurer, athlete). There are no rules on how to label your roles in life. Name them in ways that truly describe you and try to forget about what others might say or expect.

What roles do I play?

1	2
3	4
5	6
7	8
9	10



Step 2 – *Set our Goals*

For each role, list up to 3 goals (less is fine too) that will improve your performance and enjoyment of that role. Here are some examples to get you started:

Investor – Have a house deposit saved by December 2021

Business Owner – Make 3 new contacts per week in the XXXXXX Industry

Socialite – Make sure I have at least one social engagement in my diary each week.

Hot tip: Make sure you rank your roles in order of importance in your life. For example, if you're a parent and you really thinking you should rank this number 1, even though your role as a business owner or leader is pushing its way to the top, then just be honest with yourself.

Rank them according to where your energy flows first, with no judgement. There's room for all your roles.

Role	Goals
1	
2	

Role	Goals
3	
4	
5	
6	



Role	Goals
7	
8	
9	
10	

Step 3 – *Make a Plan*

Make a detailed plan for the first 3-6 months (or choose a timeframe you're comfortable with) which will see you establish the routines and carry out the required actions to live into the highest expression of each of your roles.

This list may include tasks like; how many leads you will follow up, blogs and posts to generate, events to initiate, calls to clients, etc.

For Example:

Business Owner - I will reach out to 5 new LinkedIn contacts each week.

Investor – I save \$XXXX/mth allowing me to have a \$XXXXXX home deposit by end 2021

Socialite - I organise one dinner or event (festival, weekend outing etc) out with friends every month

Here's a working example:

Role	Goals	Actions	Timeframe
Business Owner	Earn \$X	Work with X clients at a rate of \$X/day for X days per month	May 2020
	Specialise in X industry	Seek speaking roles at industry X events, conferences and seminars	Now + Ongoing
	Broaden my network in X industry	Reach out to 5 new LinkedIn contacts each week	Now + weekly



Role	Goals	Actions	Timeframe



Role	Goals	Actions	Timeframe



Role	Goals	Actions	Timeframe



Congratulations on completing your Roles & Goals plan. I encourage you to keep this document somewhere prominent so you can check in regularly to see if your actions are helping or hindering your success.

Lead yourself well and everything else falls into place.

- Angela Koning -

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