

NOTES SECTION

Triangle’s Making Goals Personal Roadmap is a tool designed to help plan the execution of your financial and non-financial goals. Whatever you want to achieve, you can use this visual roadmap to formulate your steps and drive your course to success.

Steps to Achieving Your Goals – Whether you have one, two, three or four goals for the year, use this roadmap to set your course. Each goal deserves its own map. If you are ready to get started, follow the steps below:

Step 1: Define your goal and write it at the top of the map. Use this map to track your journey and visualize the road ahead. Also, take time to define and write in your reward at the bottom of your roadmap!

Step 2: Break down your goal and segment it into time periods. The map is segmented into 3-month objectives; each objective should reflect the desired end goal. For example, if you want to save \$1,000, divide your end goal by four objectives. Every 3 months, you need to save \$250. If your current income is insufficient in helping you reach your objective, you may have to supplement your income for a few months so write “get a part-time job” as part of your objective on your map.

Step 3: Write out your objectives. Define what needs to be accomplished for every 3-month period by adding STEP blocks to your map; each STEP should align with your objective. The key is to identify 3-4 steps that you need to take during this part of your journey to reach your goal.

Step 4: Identify any obstacles or challenges. There will always be problems that come up during the year. Identify some obstacles that may prohibit you from meeting your goal and develop a contingency plan to eliminate these challenges. Apply the yellow cautionary icons to your map as a reminder that there may be an issue ahead.

Step 5: Monitor your map monthly and move your Progress icon. Monitoring your progress throughout the journey is a vital step to achieving your goal. Just like a real road trip, you need to know where you’re going or you’ll never reach your destination. Use the “Check In” flags as a reminder to review how you are doing and move your Progress icon on as you drive to your end goal.

Step 6: Celebrate with a reward. It’s important to set goals, and it’s equally important to celebrate when you hit it. Just keep in mind, your reward should be minimal to the achievement of the goal itself. For example, if you save \$1000, don’t celebrate by spending a \$1000 (maybe a movie night is in order— with popcorn, of course!).

Cut to add caution signs whenever you anticipate an upcoming obstacle or challenge.



Cut to use a Progress icon (or make your own) to move along your road map!



Write each STEP you need to take to meet your objective and then apply them to your roadmap.

| | | |
|------|------|------|
| STEP | STEP | STEP |
| STEP | STEP | STEP |
| STEP | STEP | STEP |

Making Goals Personal Roadmap



START

My Goal: _____

Objective 1 (Months 1 - 3): _____



Check Point

Objective 2 (Months 4 - 6): _____



Check Point

Objective 3 (Months 7 - 9): _____



Check Point

Objective 4 (Months 10 - 12): _____

FINISH -- My Reward: _____