FREE PDF

AI-Powered Goal Setting and Planning Toolkit

Structured prompts and frameworks for setting goals, planning quarters, tracking progress and adjusting honestly.

21	12	28
AI prompts	fill-in templates	A4 pages

What is inside

Annual and Quarterly Goal Frameworks
Set direction for the year and plan it quarter by quarter

Project Breakdown Prompts
Turn each goal into projects and clear next actions

Priority and Focus Systems
Decide what to work on and what to leave alone

Progress Review Templates
Track movement weekly and monthly without drama

Adjustment and Reflection Prompts
Change course thoughtfully when reality differs from the plan

Two-week start plan
A simple sequence for putting the system into practice

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Who this is for

Professionals, founders, freelancers and anyone who wants more intentional progress, including people who set goals but struggle to follow through.

How to use it

Plan a quarter first
Begin with one quarterly planning session using the frameworks in Section 1.

Turn goals into projects
Break each goal into concrete projects and next actions using Section 2.

Review and adjust
Check progress weekly or monthly. Keep the process honest and realistic.

Please note: results vary by tool version and settings, so review AI output before relying on it.

From Vague Intentions to Clear Goals

Vague intentions like “get fitter” or “grow the business” rarely produce steady action. A clear goal says what you want, why it matters and how you will know you have made progress.

1. **Start with what matters**
   Write down the areas of life or work that matter most this year. Limit yourself to three to five so your attention is not spread thin.

2. **Describe the outcome**
   For each area, describe the result you want in one sentence. Use specific language rather than general wishes.

3. **Choose how to measure progress**
   Pick one or two signals that show movement, such as a number, a finished item or a regular habit.

4. **Set a time frame**
   Decide when you want to reach the outcome and what a realistic mid-year checkpoint looks like.

5. **Check it is honest**
   Ask whether the goal fits your time, energy and other commitments. A smaller goal you finish beats a large one you abandon.

PROMPT 1 · GOAL SHARPENER

> Here is a rough goal: [GOAL]. Help me rewrite it as a clear outcome with a time frame, one or two ways to measure progress and one question to test whether it is realistic. Do not make the goal bigger.

Tip: AI can improve the wording of your goal, but only you can decide whether it is worth pursuing.

NOTES

Annual Vision Worksheet

Complete this once at the start of the year. Short, honest answers work best.

THE YEAR IN ONE SENTENCE what I want this year to be about

AREA 1 AND DESIRED OUTCOME

AREA 2 AND DESIRED OUTCOME

AREA 3 AND DESIRED OUTCOME

WHAT I WILL STOP OR REDUCE

RESOURCES AND SUPPORT I NEED

RISKS OR OBSTACLES I CAN FORESEE

HOW I WILL KNOW THE YEAR WENT WELL

Three Prompts for Annual Planning

Use these when preparing your annual goals. Keep personal details general when you can.

2 Reflect on last year

Use it when: You want to build on experience.

PROMPT

> Here are my notes on last year: [PASTE]. Summarize what went well, what did not, and three lessons I should apply this year. Keep it balanced and specific.

MY VERSION

3 Draft annual goals

Use it when: You have ideas but no structure.

PROMPT

> I care about these areas: [LIST]. Based on my situation [BRIEF CONTEXT], suggest one realistic goal for each area with a measure of progress and a mid-year checkpoint.

MY VERSION

4 Test for overload

Use it when: You worry you have too much planned.

PROMPT

> Review my list of goals: [LIST]. Estimate the time each might need, tell me whether the total looks realistic for a person with [N] free hours per week and suggest what to defer.

MY VERSION

Planning Your Quarter

A quarter is long enough to make real progress and short enough to stay focused. Most people plan better over twelve weeks than over twelve months.

1. **Review the annual plan**
   Look at your yearly goals and ask which parts deserve attention in the next three months.

2. **Choose two or three quarterly goals**
   More than three splits your focus. Pick the ones with the most impact or the nearest deadlines.

3. **Define milestones for each month**
   Break each goal into a first-month, second-month and third-month milestone so progress is visible.

4. **Note key dates and constraints**
   Mark holidays, deadlines, travel and busy periods so the plan is realistic.

5. **Schedule a mid-quarter check**
   Place a review about six weeks in, when there is still time to adjust.

PROMPT 5 · QUARTER PLANNER

> My annual goals are [LIST]. Today is the start of the quarter. Constraints: [LIST]. Propose two or three quarterly goals with monthly milestones and a mid-quarter review date. Flag anything that looks too ambitious.

Tip: If you cannot picture the first week of a goal, it is probably still too vague.

NOTES

Quarterly Plan Template

Complete this at the start of each quarter. Keep it to one page.

QUARTER AND DATES

GOAL 1 AND MEASURE

GOAL 2 AND MEASURE

GOAL 3 AND MEASURE

KEY DATES AND CONSTRAINTS

WHAT I WILL NOT WORK ON THIS QUARTER

SUPPORT OR RESOURCES NEEDED

MID-QUARTER REVIEW DATE

Quarter at a Glance

Place milestones and key dates on this overview. Use short phrases.

Focus	Month 1	Month 2	Month 3
Goal 1 milestone			
Goal 2 milestone			
Goal 3 milestone			
Key dates			
Risks			
Review notes			

From Goals to Projects

A goal tells you where to go. Projects are the finite pieces of work that move you there, and next actions are the first steps you can start today.

1. **List projects for each goal**
   Ask what separate pieces of work would need to be finished for the goal to be achieved. Name each project by its outcome.

2. **Keep projects finishable**
   Aim for projects that can be completed in weeks, not years. Split larger ones into phases.

3. **Define done**
   For each project, write a sentence that describes what finished looks like, so you know when to stop.

4. **Name the next action**
   Write the very next physical step for each project, such as “draft outline” or “email supplier”.

5. **Limit active projects**
   Choose a small number to work on at once. A long list of started projects is a sign of overload.

PROMPT 6 · GOAL TO PROJECT BREAKDOWN

> My goal is [GOAL] by [DATE]. Break it into 3 to 6 projects, each with a clear definition of done, rough effort and the first next action. Order them sensibly and point out dependencies.

Tip: If a project has no obvious next action, break it down further.

NOTES

Three Prompts for Breaking Down Work

Use these on any goal or project that feels too large to start.

7 Milestone ladder

Use it when: You need a path with checkpoints.

PROMPT

> Create a milestone ladder for the project [PROJECT] ending on [DATE]. Show 5 to 8 milestones in order, each with a deliverable and a rough date.

MY VERSION

8 Smallest next step

Use it when: You keep postponing a task.

PROMPT

> The task "[TASK]" feels too big. Suggest the smallest possible first step that takes under 15 minutes, and two follow-up steps.

MY VERSION

9 Dependencies and risks

Use it when: You want to anticipate problems.

PROMPT

> For the project [PROJECT], list what must be done before each step, what could delay it and a simple way to reduce each risk.

MY VERSION

Project Breakdown Sheet

Use one sheet per project. Keep it brief so it stays useful.

PROJECT NAME

GOAL IT SUPPORTS

DEFINITION OF DONE

MAIN STEPS in order

NEXT ACTION the very next step

DEADLINE OR TARGET DATE

RISKS AND DEPENDENCIES

WHO CAN HELP

Example: From Goal to Projects

This fictional example shows how a single goal becomes projects and next actions.

GOAL
Launch a small online course on beginner photography by the end of the quarter.

PROJECT 1: OUTLINE
Define six lessons with a one-line outcome each. Done when the outline is finished and reviewed by a friend. Next action: list the six skills a beginner needs.

PROJECT 2: CONTENT
Record and edit six short lessons. Done when all lessons are uploaded. Next action: script lesson one.

PROJECT 3: PLATFORM
Choose a hosting platform and set up a course page. Done when a test purchase works. Next action: compare three platforms.

PROJECT 4: LAUNCH
Announce to an existing email list and social accounts. Done when the first week of announcements is sent. Next action: draft the announcement email.

DEPENDENCIES
Lessons depend on the outline. Launch depends on content and platform being ready.

RISK
Recording takes longer than expected, so the plan includes two weeks of buffer.

YOUR EXAMPLE

Project Step Tracker

Track the main steps for one project. Record the target date and the status as you go.

No.	Step	Target date	Status	Notes
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Limiting What You Pursue

Progress usually improves when you do fewer things at the same time. A focus system helps you say yes to the right work and no to the rest.

1. **Count your active goals**
   List everything you are currently trying to achieve. Most people find the list is longer than they realized.

2. **Choose the vital few**
   Select the two or three goals that matter most this quarter. These get your best time and energy.

3. **Park the others deliberately**
   Move remaining goals to a “not now” list with a review date. Parking is different from abandoning.

4. **Use a simple filter for new requests**
   Before agreeing to something new, ask whether it serves one of your vital few. If not, decline or defer.

5. **Revisit regularly**
   Priorities shift. Review your list monthly and swap goals when circumstances change.

PROMPT 10 · FOCUS FILTER

> My active goals are [LIST]. My available time is about [N] hours per week. Help me choose the two or three that matter most, and list what to park, with a suggested review date for each.

Tip: Parked goals are not failures. They are choices about timing.

NOTES

Focus Filter Worksheet

Use this to decide what gets your attention this quarter.

ALL MY CURRENT GOALS AND PROJECTS

THE TWO OR THREE THAT MATTER MOST

WHY THESE MATTER NOW

WHAT I WILL PARK, AND UNTIL WHEN

COMMITMENTS I MAY NEED TO RENEGOTIATE

HOW I WILL RESPOND TO NEW REQUESTS

Focus Rules Checklist

Review these rules at the start of each month and adjust them to fit your situation.

Choosing

- [ ] I have no more than three active goals
- [ ] Each goal has a measure
- [ ] Each goal has a next action
- [ ] Parked goals have review dates

Protecting

- [ ] Focus time is on my calendar
- [ ] I decline requests that do not fit
- [ ] I batch small tasks
- [ ] I limit new commitments

Reviewing

- [ ] I review goals every month
- [ ] I remove goals that no longer matter
- [ ] I celebrate finished projects
- [ ] I note lessons learned

Balancing

- [ ] I have time for rest
- [ ] Work does not crowd out relationships
- [ ] I include one personal goal
- [ ] I plan breaks and buffers

Three Prompts for Priorities

Use these to compare options and decide with a clear head.

11 Compare goals

Use it when: You cannot decide between two goals.

PROMPT

> Compare the goals [GOAL A] and [GOAL B] using impact, effort, urgency and fit with my values of [VALUES]. Give a short table and a suggestion, then list what information would change your recommendation.

MY VERSION

12 Handle a new request

Use it when: Someone asks for your time.

PROMPT

> I currently focus on [GOALS]. I have received this request: [REQUEST]. Help me decide whether to accept, and draft a polite reply that either agrees on clear terms or declines.

MY VERSION

13 Weekly top three

Use it when: You want a practical short list.

PROMPT

> From my quarterly goals [LIST] and tasks [LIST], choose the three most valuable outcomes for this week and suggest which day to start each.

MY VERSION

Weekly Focus Planner

Choose your focus for each day this week. Aim for one meaningful step toward a quarterly goal each day.

Day	Goal	Main action	Time block	Done?
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Weekend				

A Simple Review Rhythm

Reviews turn plans into progress. A short weekly check and a longer monthly review are enough for most people.

1. **Weekly: look at actions**
   Check what you did against what you planned. Note what slipped and why, then choose next week's actions.

2. **Monthly: look at milestones**
   Compare progress with your monthly milestone. Decide whether you are on track, ahead or behind.

3. **Quarterly: look at goals**
   At the end of the quarter, judge each goal honestly and decide to continue, adjust or stop.

4. **Use evidence**
   Rely on measures and notes rather than feelings alone. Evidence keeps the review fair.

5. **Keep it kind and practical**
   Reviews should help you decide what to do next, not punish you for what has not happened.

PROMPT 14 · PROGRESS ANALYSIS

> Here are my goals and my progress notes: [PASTE]. Tell me whether I appear on track, what the main obstacles are and what small changes would help. Be honest but constructive.

Tip: Put review sessions in your calendar. Unscheduled reviews usually do not happen.

NOTES

Weekly Progress Review

Complete this each week in about ten minutes.

WEEK OF

ACTIONS COMPLETED

ACTIONS MISSED, AND WHY

PROGRESS ON MY MAIN GOAL

WHAT HELPED

WHAT GOT IN THE WAY

NEXT WEEK'S KEY ACTIONS

Monthly Review Template

Complete this at the end of each month. Take twenty minutes.

MONTH

MILESTONES REACHED

MILESTONES MISSED

BIGGEST WIN

BIGGEST OBSTACLE

MEASURES THIS MONTH

TIME WELL SPENT

TIME POORLY SPENT

WHAT I WILL ADJUST

PRIORITIES FOR NEXT MONTH

Three Prompts for Progress Reviews

Remove private details before pasting any notes into an AI tool.

15 Weekly recap

Use it when: You want a quick summary.

PROMPT

> From my notes this week [PASTE], write a short recap with progress, obstacles and three suggested actions for next week. Keep it under 120 words.

MY VERSION

16 Monthly diagnosis

Use it when: You are behind and unsure why.

PROMPT

> I planned [MILESTONE] this month and achieved [RESULT]. Notes: [PASTE]. List the three most likely reasons for the gap and a practical response to each.

MY VERSION

17 Evidence check

Use it when: You want a fair view of progress.

PROMPT

> Here are the measures for my goal: [DATA]. Tell me what they suggest, what they do not tell me and what extra information would give a clearer picture.

MY VERSION

Progress Review Checklist

Use this during weekly and monthly reviews.

Look back

- [ ] Reviewed planned actions
- [ ] Checked measures and numbers
- [ ] Noted wins
- [ ] Noted obstacles

Understand

- [ ] Asked why things slipped
- [ ] Separated causes from excuses
- [ ] Spotted patterns
- [ ] Noted lessons learned

Decide

- [ ] Chose next actions
- [ ] Dropped what no longer fits
- [ ] Moved dates honestly
- [ ] Asked for help where needed

Reset

- [ ] Updated the plan
- [ ] Scheduled the next review
- [ ] Cleared my task list
- [ ] Gave myself credit for progress

Adjusting Without Giving Up

Plans meet reality. Adjusting a goal is a sign of learning, not failure, provided you do it deliberately.

1. **Name what changed**
   Identify what is different from when you set the goal: time, resources, priorities or circumstances.

2. **Choose an adjustment type**
   You can extend the date, reduce the scope, change the approach or pause the goal. Pick the one that fits the facts.

3. **Protect the core**
   Keep the part of the goal that matters most and trim what is less important.

4. **Write the new plan down**
   Record the adjusted goal, the new date and the reason, so you can see your thinking later.

5. **Communicate if needed**
   If others depend on your goal, tell them early and clearly about the change.

PROMPT 18 · ADJUSTMENT OPTIONS

> My goal was [GOAL] by [DATE]. Currently, [SITUATION]. Suggest four options: extend, reduce, change approach or pause. Explain the trade-offs of each and which seems most sensible.

Tip: Decide whether to adjust at a planned review, not in the middle of a bad day.

NOTES

Three Prompts for Reflection

Use these at the end of a quarter or after a setback.

19 Lessons learned

Use it when: You want to learn from the quarter.

PROMPT

> Here are my notes on this quarter: [PASTE]. List three lessons, one habit to keep, one to change and one question I should think about before planning the next quarter.

MY VERSION

20 Realistic reset

Use it when: You feel behind.

PROMPT

> I am behind on [GOAL]. I have [N] weeks and about [N] hours per week. Suggest a realistic reset plan with a smaller target, a first step this week and a checkpoint.

MY VERSION

21 Values check

Use it when: You wonder whether the goal still matters.

PROMPT

> Ask me five reflective questions to find out whether the goal [GOAL] still matters to me, whether I should continue and what I might do differently.

MY VERSION

Reflection Worksheet

Complete this at the end of a quarter or after a major change.

WHAT I SET OUT TO DO

WHAT ACTUALLY HAPPENED

WHAT I AM PROUD OF

WHAT I WOULD DO DIFFERENTLY

WHAT I LEARNED ABOUT HOW I WORK

GOALS TO CONTINUE, ADJUST OR STOP

MY INTENTIONS FOR NEXT QUARTER

Example: A Quarterly Adjustment

This fictional example shows a thoughtful change to a goal, with reasons.

ORIGINAL GOAL
Publish twelve articles in a quarter.

WHAT HAPPENED
Five articles were published. A busy client period and a family event reduced writing time.

DIAGNOSIS
The target assumed four free hours per week, but only two were available on average.

OPTIONS CONSIDERED
Extend to six months, reduce to eight articles, or keep twelve with shorter articles.

DECISION
Reduce to eight articles for the next quarter and write shorter ones to keep momentum.

PROTECTED CORE
A regular publishing rhythm and one flagship article a month.

NEXT STEP
Schedule two weekly writing blocks and review in six weeks.

WHAT THE WRITER TOLD OTHERS
Informed the editor of the new target and offered two flagship dates, so nobody was surprised by the change.

LESSON
Estimates based on real available hours work better than estimates based on good intentions. The goal changed, but the commitment to publish regularly stayed.

YOUR ADJUSTMENT

Your two-week start plan

Begin with a single quarterly planning session, then build the review habit. Keep the process honest and realistic so it stays useful.

Days 1–2

Set your direction

Complete the annual vision worksheet and choose three areas to focus on.

Days 3–4

Plan the quarter

Fill in the quarterly plan template and the quarter at a glance.

Days 5–7

Break goals into projects

Use a project breakdown sheet for each goal and name the next actions.

Days 8–10

Apply the focus filter

Decide what to park and set review dates for parked goals.

Days 11–12

Run your first weekly review

Use the weekly progress review and plan the next week.

Days 13–14

Schedule your reviews

Put weekly, monthly and quarterly reviews on your calendar.

AI supports clarity and organization; it does not make decisions for you. Results vary by tool version and settings.