

# Personal and Professional Goal Setting

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*You can't have everything. Where would you put it?*

Steven Wright

Preparing for your professional career begins with knowing what you want to experience during your life. Career management requires setting personal and professional goals so you can make decisions most likely to reach these goals. Setting goals can be the most difficult step to managing your career. Logic tells us, "If we don't know where we want to go, how are we going to make decisions that allow us to get there?" Although this seems to be common sense, many of us do not set goals.

This chapter will explain why goal setting is important to career management, what a goal is, why people do not set goals, and how to set goals. The reader should be able to prepare a plan for a full career in optometry that provides desirable personal and professional outcomes and alter it according to new circumstances that may occur during one's life.

## TYPICAL PHASES IN THE LIFE OF AN OPTOMETRIST

As a young graduate fresh out of school, you are concerned with paying off loans, buying a car, perhaps purchasing your practice or your first home, and eating something besides fast food. Other goals may include traveling, joining the local country club, or owning a vacation home at the beach.

As a recent graduate, the main resource you lack is money. Recognizing this, the first decision you may make related to your professional practice is to choose a practice opportunity that provides this resource. The recent graduate asks himself or herself, "How can I get the money I need to get what I want and to do what I want?"

The young graduate may initially work for someone and then eventually develop a private practice. Income gradually increases, and goals change. During this period, the personal goals the optometrist initially set often take a back seat to the family's needs: a large home, a swimming pool for the kids, trips to the grandparents, baseball equipment, dance lessons, soccer leagues, church, braces, and finally, college tuition. Suddenly the doctor realizes he or she is on the downside of life and has not sailed around the world or taken that much discussed tour of Europe.

As optometrists, most of us start to notice this in our early forties. For years, you tell your patients, "The lens inside your eye is stiffening, making it difficult for you to change focus." The patient indignantly replies, "You mean I'm getting old!" And you respond, "No, you are not getting old . . . our eyes do not change focus as well after age 40." (Really you are thinking, "Of course you are getting old. For goodness sake, look at yourself in the mirror!") Then the day comes when the phoropter dials are blurry in the dim light of the examination room. Guess what? You are the one getting old!

You remember your youthful goal of sailing around the world. At some point you realize that although you now have the money to do what you want, the main resource you lack is time. Who is going to watch the office? Who will see the patients? Who will pay the bills? Who will buy the practice when you retire? These questions go through the minds of optometrists who want to pursue the dreams of their youth. Align your professional goals in Appendix A with your personal goals to provide the time and the income to reach your life's goals.

## GOAL SETTING IS A KEY TO SUCCESS

By focusing on personal and professional goals, we can plan for a fulfilling life. Getting the most out of your optometric career requires careful planning. Have you ever sat down and set goals for your life? Did you write them down? Most of us, if asked, would like to be successful in our life. Being a success means different things to different people. Success may mean owning an optometric practice or a new Ferrari. Perhaps you have always dreamed of having a home overlooking the ocean. Or success may be having five kids and coaching their baseball and soccer teams.

Actress Carol Burnett defines success as "getting a good seat in a restaurant, eating marvelous food, meeting an awful lot of nice people, being able to go to the dentist twice a year and being quoted in magazines. Best of all, success means having enough closet space!" Garfield, our favorite cat, defines success as "Being able to eat 20 pizzas without throwing up!"

How would you define success in your life? One way of simplifying what we mean by success is by using the definition:

“Success is getting what you want.” Once you determine what you want, you will be able to measure whether you are successful. It follows that the first step in becoming successful is to set your goals. Although your goals are sure to change with time, it is easier to plan once you have an idea of the final destination. No doubt many of you would like to own your practice and be among the top 10% of wage earners in the United States. A closer look at the following simple facts from industry consultant Harry Jones of Achieve Max, Inc, will help you recognize how you can be in the upper percentile of successful people:

- The average person is out of school 4 years before he or she starts thinking about goals...and usually is married with one child.
- less than 5% of the population sets goals.
- less than 1% of those who have goals write down their goals.

By setting goals and writing them down, you can become a member of an elite group of people who have a plan for success.

What happens to the average person who graduates from college but does not set goals? Of all college graduates, the average person leaves his or her first job within 18 months. Many have not thought through what it is they are really looking for in a career. Because of this, it is not until 18 months have gone by that some realize that this job is not what they want. Good planning and well-chosen strategies can help you avoid the experience of going from one practice situation to another, starting over again at each stop.

## WHY GOAL SETTING IS IMPORTANT TO CAREER MANAGEMENT

Optometry was chosen as a career for many reasons. One reason is that optometry offers the best opportunity to get what one wants from life. One of the greatest advantages of a career in optometry commonly cited is that optometry offers a variety of ways to practice. According to the Association of Schools and Colleges of Optometry (ASCO), optometry will enable you to “have the luxury of combining a prestigious professional career with a very satisfying personal life.”

Setting goals allows you to be efficient in reaching them by focusing your efforts and decision making. Being more efficient means reaching goals quicker with less effort and misuse of resources. In the final analysis, being more efficient will allow you to achieve more and experience more with your abilities and resources.

The first step to career management is setting your personal goals. Once you have a good idea of what goals you want to achieve in your personal life, you can design your professional goals to help you reach them.

A life design exercise, used by many life planners, career planners, and therapists, takes only a few minutes and can get you started in setting goals. It will stimulate your thinking, force you to confront some of your ambivalences, and assist you in figuring out who you are and what you want. Spend about 6 minutes completing the life design exercise in Box 2-1.

### BOX 2-1

#### Life Design Exercise

Write on a piece of paper your lifetime goals. List everything you want to have someday. List everything you want to do.

Shorten the time frame and list your goals for the next 3 to 5 years.

Finally, put down your goals for the next 6 months, assuming that is all the time you have left on the planet. How would you want to play out your life if you had just 6 months to go?

*After completing the exercise, ask yourself the question, “What did you learn about yourself from listing your goals?”*

Completing this exercise allows you to recognize what is most important in life. It allows you to learn what you value most. In the end, most of us value personal relationships.

Of course, first-year students typically give many other answers for what is really important. There are the death-wish answers: bungee jumping, parasailing, hiking Mount Everest, or racing dragsters. (I mean if you are going to die anyway you might as well go out with a bang!) Then others are more into hedonistic pleasures: all the sex I can get, max out the credit cards, eat lots of bad food, and borrow as much money as I can. (Who cares if someone has to pay for all my indulgences, I’ll be gone!) Finally, there are the sweet answers: marry my fiancé, tell mom I love her, and ask my girlfriend to marry me. (“Hi honey, let’s get married I’m dying in 6 months!” Do you have to be dying to tell your mother you love her? Call her right now! Tomorrow is promised to no one.)

Revisit this exercise from time to time and share it with those you care about. It will keep things in perspective for you and motivate you to set your goals using a more meaningful process discussed later in this chapter.

## WHY PEOPLE DO NOT SET GOALS

The four main reasons people do not set goals are as follows:

1. They do not understand the importance of goals.
2. They do not know how to set goals.
3. They fear rejection.
4. They fear failure.

### They Do Not Understand the Importance of Goals

Research studies on success show that goal setting is the most important step to success. Articles are written in newspapers and magazines on a regular basis touting that success begins

with goal setting. As mentioned earlier, you cannot measure success until you set goals to achieve. An article from Success Magazine illustrates the importance of goal setting with the title, “Act Now—or Die. Why You Must Plan Beyond Yourself to Succeed Today!” Leon A. Danco, Chief Executive Officer of the Center for Family Business, has spent the past 35 years advising thousands of family-owned businesses. He explains, “Anybody who wants to be a success has got to think about the end before he gets engaged in the beginning...you have to commit to the longevity of your business.”

The number of small US businesses has surged in this decade but so has the rate of failures. Fortunately, optometry is ranked as the second most risk-free business in the US. Our success, however, depends on our plans. The first of a five-part series on ways to help a small enterprise succeed begins with “Big Step into Small Business Begins with a Plan.”

You would not build a building without plans. You would not attempt to decorate an office without plans. Why would anyone want to put a life together without plans?

Setting goals does not end with an initial plan. The article, “Evaluation and Re-evaluation in Ophthalmology Management” explains “Unlike New Year’s resolutions that are resolved once and never accomplished, our career and life’s resolutions must be reviewed periodically. As we get older, our needs may change. We must evaluate our careers and ask ourselves if they are helping us achieve our long-term goals.”

## They Do Not Know How to Set Goals

Besides being the most important step to success, this is the most difficult step. Setting goals requires a process, procedure, or talent that is acquired through learning. As we look at what is a goal and the process of planning goals, you will see what is required. It is helpful to keep in mind that you have already set goals in the past to some extent. You had the goal to get into optometry school...and you succeeded!

The process of developing goals will require you to answer several questions. What do I want to get out of my career? What is my vision for the future? How compatible are my personal goals with my professional goals? How compatible are my goals with my spouse’s or my family’s goals?

One way of beginning your life plan is by answering the questions, “If you could write the inscription on your tombstone and if you were limited to three words, what would you write?” This is tough to answer. One person answered: “He Helped People.” If this was your epitaph, what career goals would you need to achieve to justify those three words? Others you may prefer are: “She Taught Others,” “He Improved Lives,” “She Gave Vision,” “He Loved Us,” or “She Served God.” The actual process of setting goals is much more complicated than planning what is to be printed on your tombstone. Practice the process outlined later in this chapter and you will know how to set goals.

## They Fear Rejection

Achieving goals often means making mistakes. Sometimes we have to try things to see what works. We may be required to

apply for a desired position ten times before you are finally accepted. Imagine the actor auditioning over and over again trying to get a part in movies or television. Many of us are afraid of being turned down. To attain

certain goals, persistence is the most important personal attribute. Not being afraid of rejection opens you up to many more possibilities in this world.

## They Fear Failure

Others are fearful of never reaching their goal. It takes a level of confidence and bravery to declare a goal. Some think to themselves, “What will people think if I don’t make it? What will they say when I fail?” A professional golfer is successful if he or she wins one tournament on the pro tour. They fail over and over trying to win. They fail over and over during a typical round. Tiger Woods hits the ball into the trees and misses putts in front of millions every tournament. Some goals require dealing with failure. Thomas Edison failed over 1,000 times trying to make the first light bulb!

One way to look at failing is a quote from Lou Holtz, the well-known college football coach and ESPN analyst. “If we succeed 100% of the time, we are not trying hard enough. We are conservative. Failure is a normal fact of achievement.”

Success plans that include goals actually produce fewer disappointments. As you focus on your goals, you will be able to monitor your progress. You will gradually become aware of the inability to reach a goal instead of suddenly feeling like a failure. Planning to reach goals actually prepares you for setbacks. You will have a good understanding of why the goal was not reached. This will lead to reevaluating future goals and strategies and produce more consistent results, quicker outcomes, and more rewarding accomplishments.

Achieving the steps toward a major goal will motivate you toward trying harder. An example is losing weight. Losing weight is difficult. But once you start to lose weight, get quicker on the tennis court, or fit into clothes you have not worn in years, you will be motivated to continue...with enthusiasm! A sense of accomplishment can encourage you on to greater feats and achievement.

Having goals allows you to measure your progress. Goals are necessary to answer the question, “How is it going?” Ask yourself if you have made progress toward your life’s goals. If the answer is yes, you can say, “Things are going well!”

## DEFINITION OF A GOAL

Goals are future realities that you commit to in the present. A goal may stem from a wish, a desire, a hope, a dream, a want, or a need. But a goal differs from all of these in that it is a planned commitment. To achieve it requires active effort in a positive direction. A desire to change something that is not acted on is merely a wish or a complaint. A desire to change that commits energy, and action to that change is a goal. You may wish you did not smoke, but unless you commit to taking the positive steps of reducing or stopping, it remains only a wish.

When we are driven by the desire to achieve goals and locked in by a commitment to work for them, goals become powerful forces drawing us in the direction of personal success. A goal is a prelude to action, driven by the motivation that expects to see it realized. Commitment is the key component to a goal; it is the ingredient that makes goals attainable and at the same time, sets them off from mere wishing. By establishing a goal or objective, we give purpose and direction to our efforts, focusing our efforts rather than having them scatter in all directions. We are all working and living every day; goals permit us to know exactly what we are working toward. Frankly, if after a few years you have not progressed toward a goal you set, it really was not a goal at all. You failed the first attribute of a goal: it is a planned commitment.

Another attribute of a goal is that it is specific, observable, and measurable. “I will feel better about my business” is not a goal nor is “I want to handle money better” or “I’ll have time for a hobby.” You must be able to measure your progress and say with great certainty that the goal has or has not been achieved; it is a clear yes or a clear no or you do not have a measure of your success. Such things as X dollars, X number of rooms, specific make of car, specific title, and X number of days are measurable since you can count them or point to them. Commonly, students will state the goal “I want to be happy,” which certainly is not unreasonable but not specific and measurable. Choose goals that are specific and measurable that will contribute to being happy in your particular case. For example, “I will be married with three children by 2015.”

Time is an important part of every goal. The specific time by which the goal will be accomplished must be part of the goal statement. To say that you will learn another language “someday” is not a goal until you put a realistic time frame on it. Because some goals take a very long time to accomplish, it is often necessary to create subgoals or short-term goals to serve as checkpoints for determining progress toward the main goal. In fact, it is a good idea to examine your long-term goals for ways to break them up into steps that you can achieve piecemeal, monitoring progress step-by-step on your way toward achieving the larger goal. Figure 2-1 is a sample goal sheet that can serve as a template for you to focus on achieving larger goals.

Everyone is different as to how far ahead they can plan. One of the amazing outcomes of goal setting is reaching lifetime goals so quickly. Goals you list for your entire life may be reached within 10 or 15 years. For many people, it is recommended that a majority of goals be no more than 5 years out, with the highest percentage of goals being located in the 2- to 3-year time frame. Any longer and they tend to be more difficult to focus on, less powerfully motivating, more subject to change (a great deal can happen in your life and your family in a decade), and less consistently achieved. Intermediate goals are generally viewed as encompassing 1 year. Short-term goals encompass 2 to 3 months. Short and intermediate goals are usually viewed in terms of being steps along the way that contribute to the major mission, or long-term goal. With time, you will learn what time period works best for you.

How many goals a person should have is a matter of individual choice. Try to have enough goals that allow you to plan a fulfilling and complete life for yourself.

Once set, goals may change if the reason is a good one. There is fluidity about life that needs to be reflected in our goals. No one should adhere so rigidly and blindly to their goals that they sacrifice all happiness to attain them. The whole purpose of goal setting is to make our personal and professional lives more rewarding. A too-rigorous, stubborn clinging to outdated goals in a circumstance that has dramatically changed the appropriateness of the goals defeats the primary purpose of the goal-setting process, which is to achieve rewarding and meaningful success. Remember, life is replete with change. As we grow and change, our visions and goals change too, reflecting our personal and professional growth.

On the other hand, goals that are constantly being changed, dropped, altered, revised, or frequently forgotten are not true goals. To abandon goals that you have set is to cheat on the greatest commitment you can possibly make—a contract with yourself. A goal is a promise to work in a given direction, toward a known result. The promise is to oneself.

A goal is defined as a planned commitment that is specific, measurable, observable and has a time element. To put your goals into perspective, check to see if they pass the following “SMART” test. In this test, your goals should be:

Specific: “I know what I have to do.”

Measurable: “I’ll know when I’ve reached the goal.”

Achievable: “I think it can be done.”

Realistic: “I know the goal is reasonable and appropriate.”

Time bound: “I know when it must be done”

## THE PROCESS OF GOAL SETTING

It might seem that setting goals should be easy: just sit down and do it. But randomly selecting a direction to go, an objective to shoot for, or simply listing every desire you have on a piece of paper and calling them goals is not an effective approach. A practical approach is to begin with an assessment of who, what, and where you are now. Before you start looking at goals for the future, you must assess the present. Inventory your strengths and weaknesses; analyze your age, family condition, energy level, and general outlook. Take stock of your health, background, and heritage. Get a fix on all the “building materials” you have at your disposal—family, friends, associates, geography, finances, degrees, and professional and personal history. Realistic goal setting means knowing who you are so that as you shape the future toward specific objectives, you know the challenges and rewards that are likely to occur. The process of goal setting consists of going through the following five practical steps:

1. Selection
2. Analysis
3. Support
4. Feedback
5. Imaging

This process is the same for establishing personal, as well as professional, goals and cuts across all areas of activities, including sports, finance, family, leisure, health, housing, or any other area.

Today's Date \_\_\_\_\_

Specific Goal: \_\_\_\_\_

Specific benefits of reaching goal: \_\_\_\_\_

Target date: \_\_\_\_\_

Where am I today with regard to the goal? \_\_\_\_\_

\_\_\_\_\_

Obstacles to achievement: \_\_\_\_\_

\_\_\_\_\_

Checkpoint dates: \_\_\_\_\_

Intermediate Goal #1: \_\_\_\_\_

Intermediate Goal #2: \_\_\_\_\_

Intermediate Goal #3: \_\_\_\_\_

Intermediate Goal #4: \_\_\_\_\_

Plans for surmounting obstacles: \_\_\_\_\_

\_\_\_\_\_

Specific actions to take to form new habits: \_\_\_\_\_

\_\_\_\_\_

Date Goal was Met: \_\_\_\_\_

## Selection

Although there are no limits to what you can do with your life, there are limits to how many things you can concentrate on at one time and how many directions you can start off in at once. To begin this step, list all of the things you would like to do or have “someday.” List everything that you have dreamed about achieving “someday.” Brainstorm on all the possibilities you may be interested in experiencing in your life. You can use the Future Plans Exercise in Appendix B to assist you in thinking of areas you may want to set goals within.

Now, go over the list and take time to imagine each one as a reality. Imagine it as being actual, real, and as though it has actually occurred. Visualize each in great detail. Then select one that means the most to you. Allow the individual items to impact you, to make their own strong, loud case in your mind. Your task is to choose a goal that really matters to you— one that motivates you when you consider it mentally, one that you find overwhelmingly compelling, urgent, strong, and insistent.

Step 1 is really the process of letting the goal stand out to you; it selects itself by making the background static or become less loud and by shining as a strong message that makes the others on the list look less appealing.

## Analysis

“Gut feel” is a fine procedure to use in selecting a compelling goal; however, rational, practical, and objective analysis will help strengthen your commitment to that goal, taking it out of the realm of desires and wishful thinking into the objectivity and reality of the goal-setting process. Analysis is really asking yourself the following questions about the goal:

1. Why have I chosen this goal?
2. What rewards are there if I were to successfully achieve it?

The first question asks you to consider how the goal contributes to your personal and/or professional life. What really is the value or worth to the whole category? How meaningful in your big picture, your success plan, is this specific goal? Does it strike an area where you are particularly concerned or eager for growth? Are you convinced of the need, desirability, and absolute necessity that it be achieved than merely feeling that it is rather something that would be “nice to have?” Are you willing to begin to change habits and attitudes to accomplish it? The second question asks you to expand the value of the goal to other areas. What does achieving this goal mean to you in terms of other rewards? If you have accomplished this goal, what else is made available to you or is more plentiful than before? Is it time? Money? Recognition? An enhanced sense of accomplishment?

## Support

Step 3 requires building support systems. This step and the fourth step, feedback, are especially important for reaching long-term goals, although all steps apply equally well to all your goals, even intermediate and short-term goals. Ask yourself who can help you achieve this goal. Ask what financial, professional,

personal, family, and community support you will have for this effort. No one is alone. Everything that you do affects a great many others, and they in turn have the opportunity to help strengthen and support your striving for your goals.

Whether support comes in the form of a mentor from whom you seek advice, wisdom, encouragement, and knowledge, or from a large support group of specialists, such as those used by professional athletes, each looking at different aspects of the whole effort, you should take time to examine your full range of support. No one does anything totally on their own. Even the most confident, autonomous, pioneering spirit, who is strong, independent, self-acting, and selfactualizing, is still receiving strength from other sources. It is important to know as you set a goal who is likely to be the biggest help to you in achieving that goal, what person near you can reinforce your efforts, and who or what organization is likely to be your biggest ally with the biggest assets to support you in achieving it.

## Feedback

No goal of even the shortest term should be governed by a deadline only. You need to know the progress being made toward accomplishing the goal on a timely and ongoing basis. When setting a goal, establish the process, procedures, and systems by which you will be getting feedback on how you are progressing toward that goal. You need to be able to monitor quickly, frequently, and accurately where you are in accomplishing the goal. If your goal is a bank balance, the feedback is easy; you can watch it grow monthly on the statement. If the goal is more complex, for example, an addition to the house, divide the goal into specific events that are measurable and show progress, such as plans developed, money acquired, contractor contacted, ground broken, wall framed, roof on, and so forth, until you reach the completion date. Planning a life is much like planning a room addition. You need a solid foundation first, then a plan to build it in logical steps so everything fits together. Each step in the process toward a goal, each monitoring checkpoint becomes a mini goal, a small objective necessary to be achieved on the way to accomplishment of the main goal (see Figure 2-1).

Without this important step, without a method for checking progress, you will be unsure of exactly how you are doing; how much closer your goal is to becoming a reality. Goals that are planned and accomplished do not sneak up on you; they are the result of a logical step-by-step process in a chosen direction with our full support and effort behind them. Accomplishments never come as surprises; they are the natural unfolding of the process that you started in motion when you first set a goal and committed yourself to its achievement. You need feedback all along the way.

## Imaging

In some ways, this is the easiest yet most important step in the process of goal setting. All extraordinary accomplishments come as a result of someone’s being able to imagine them and

then being able to maintain that image as a goal and strive for it. You must picture your goal; you must anticipate it in your mind. It was Walt Disney who said, “If you can imagine it, you can achieve it!”

In your mind, you need to go to the goal already achieved as you set it down on paper. Begin moving toward that goal by imagining that it is already accomplished. Picture yourself involved in that goal. See yourself as already being there as a result of that goal. Now, look back from the position of the goal having been reached and see yourself participating in the process of achieving that goal. Rehearse some of the activities you had to be involved in to reach the goal. Mentally go over and over this process until it is fixed with clarity in your mind. Many athletes use this visualization before attempting to achieve in sports. Professional golfers visualize the shot and do not attempt it until it is firmly implanted in their mind.

If the goal is tangible, like a house, car, boat, airplane, or clinic, go see one, visit it, sit or walk in it, look at it, feel it, and make it yours. Imagine yourself there until it becomes natural to you. Visiting optometric practices or model homes can be a stimulus to working hard to get there yourself.

The mental visualization of a goal accomplished is the most motivating, powerful influence on reaching the goal. It helps you become motivated and shapes your behavior in the right direction, begins to break old habits and attitudes, and triggers the energy needed to succeed. Nothing you can do daily will do more to impact the outcome of your efforts than to imprint the goal on your thought processes. The exact opposite of daydreaming, this process is the engine starter for each day’s action, and it will keep you focused on your target. Everyone needs a reason to get out of bed in the morning. Embracing the achievement of your goals will motivate you to do so.

Imagine yourself 5 years from now. You wake up in the morning. What do you see? Is there someone next to you? What do they look like? How is the room decorated? As you walk through the house how does the interior of the house appear? Do children greet you? How are you dressed for the day? What type of car do you get into? Where do you go? What does the day hold for you? Imagine what you want your day to be like, what you will see, hear, smell, taste, and feel. Then, set up a plan to reach that wonderful day you imagine experiencing. See Appendix C for an exercise to assist you with this.

## CONCLUSION

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By beginning with your personal goals, you provide the best possible basis for building professional and career goals that fit you and your individual, unique situation. No one is exactly like you; no one else has your desires, dreams, talents, and attitudes toward home, family, leisure, retirement, locale, and so forth.

Create personal goals and professional goals by completing the Future Plans Exercise (see Appendix B). Use this exercise to create a template to build a wonderful fulfilling life. Upgrade your goals annually. Monitor your progress. And the next time you are trying to decide what to do with your time or money, ask yourself the question, “How will this help me reach my goals?”

Some of you will have a very difficult time writing specific, measurable, achievable, realistic, and time-bound goals. Those of you who have difficulties, remember this second quote from Lou Holtz: “Deep down inside, you better have a dream, have a goal, or it won’t happen...” Also consider “If you don’t care where you’re going... any road will take you there...” Care where you are going. Your life and the lives of those around you depend on it.

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## APPENDIX A

# PROFESSIONAL GOALS

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Professional goals can influence which marketing goals and objectives you should focus on. Circle the professional goals you are interested in. What time and resource commitments are required? How can you blend these goals with your personal and practice goals?

- Participation in national organizations and associations: American Academy of Optometry, College of Optometry and Vision Development, Optometric Extension Program, American Optometric Association, regional optometric associations, Better Vision Institute, American Optometric Foundation, Contact Lens Society of America, American Public Health Association, optometry school alumni association, other
- Participation in state organizations and associations committees: Board of trustees, education, health care delivery, public awareness, membership, legislative, political action, nominating committee, other
- Local organizations and association activities: Optometric society officer, education, membership, governmental affairs, political action, bulletin, public awareness committee, college or university school faculty, optometry school board of trustees, other
- Public service:  
Public speaking, writing articles, newspaper contact, political contact key-person, school consultant, industrial consultant, expert witness, state board member, public school board member, public health service, Flying Samaritans, Volunteer Optometric Services to Humanity, Vision USA, Special Olympics, other
- Professional services: Primary care, contact lenses, low vision, visual therapy, sports vision, geriatric vision, orthokeratology, pediatrics, convalescent hospital care, finishing lab, full service lab, solutions, pre- and post-op care, other
- In summary, my professional goals are:
  - 1 .
  - 2 .
  - 3 .
  - 4 .
  - 5 .

## APPENDIX B

# FUTURE PLANS EXERCISE

This exercise is designed to increase awareness of areas in which you have growth opportunities, assist you in identifying resources needed to carry out your plans, and encourage you to recognize those areas of optometry most consistent with your plans. You should do this exercise throughout life; it can give you direction and motivate you to use your time constructively. This outline will help organize your dreams into concrete goals. Some categories may not be relevant to you, and you should feel free to add more categories. Each goal is best expressed as measurable and specific. Include a target date for each. For each goal, write down where you are today, obstacles to achieving the goal, checkpoint dates, and specific actions to take to form new habits.

- Educational
  - A . Interest classes
  - B . Postgraduate education
- Optometric practice
  - A . Self-employed or employed
  - B . Location
  - C . Type of practice
  - D . Scope of practice
- Teaching
  - A . Public speaking
  - B . City college
  - C . University
  - D . Optometry school
- Research
  - A . Private practice
  - B . Industry
  - C . Optometry school
- Investments
  - A . Real estate
    - 1 . Home
    - 2 . Office
    - 3 . Vacation home
  - B . Practice
  - C . Stocks and bonds
  - D . Retirement
  - E . Insurance
  - F . Other
- Home improvements/construction
  - A . Interior decorating
  - B . Landscaping
- Personal
  - A . Cars
  - B . Clothes
  - C . Dining out
  - D . Other
- Community activities
  - A . Church, temple
  - B . Service clubs
  - C . Other
- Political office
  - A . Optometric
    - 1 . Local
    - 2 . State
    - 3 . National
  - B . Public
    - 1 . Local
    - 2 . State
    - 3 . National
- Travel
  - A . National
  - B . International
- Recreation
  - A . Sports
  - B . Hobbies
  - C . Club membership
- Family
  - A . Marriage
  - B . Children
  - C . Children/spouse plans
- Retirement
  - A . When
  - B . Expected income level
  - C . Planned activities
  - D . Location
    - 1 . Local
    - 2 . State

## APPENDIX C

# SAMPLE OUTLINE OF FUTURE PLANS

- Educational
  - A . I will attend one creative interest class a year at Palomar JC in creative writing, sculpture, calligraphy, and cooking starting in 2012.
  - B . I will work toward a master's degree in special education from UCSD in 2010.
- Optometric practice
  - A . I will be self-employed by purchasing a solo practice or joining a group practice on graduation in 2010.
  - B . It will be located in Southern California, in North San Diego County.
  - C . The practice will be in a medical building or free-standing professional building.
  - D . I will specialize in children and seniors, providing vision training, contact lenses, and glaucoma therapy.
- Teaching
  - A . I will lecture to clubs and associations 6 times a year beginning in 2010 in: Vision and tennis Vision and golf Vision and learning The eye and sight Geriatric vision problems High blood pressure, high cholesterol, and the eye Photography and perspective Art and visualization
  - B . I will teach the course "Vision and Learning" at Palomar JC beginning in 2010.
  - C . I will lecture in the course "Visual Perception and Learning Disabilities" at UCSD beginning in 2011.
  - D . I will be a clinical instructor in vision training, contact lenses, and general optometry at SCCO on graduation. After receiving my master's degree in education, I will be lecturing as an associate professor in the areas of perception and learning disabilities at SCCO.
  - E . I will volunteer as a high school tennis coach 3 afternoons a week beginning in 2009.
- Research
  - A . I will get involved in clinical studies with contact lens and spectacle lens companies, as well as pharmaceutical companies by 2013.
  - B . I will complete one research project every year beginning in 2010 in:
    - 1 . The ideal correction, contact lenses vs. spectacles for specific situations
    - 2 . Refractive aniseikonia
    - 3 . Declination angle and performance
    - 4 . Binocularity and contact lenses
    - 5 . Vertical phoria, fixation disparities, and contact lenses
- 6 . Vision training techniques
- 7 . A program of in-office and home vision training to treat:
  - Amblyopia
  - ARC
  - Convergence insufficiency, excess Ocular motor dysfunction Accommodative infacility
- 8 . Optometry and learning disabilities
- 9 . Treatment and diagnosis of learning disabilities
- 10 . Vision training to treat visual perceptual problems
- Investments
  - A . I will purchase an optometric office by 2009.
  - B . I will buy my first home by 2010 and rent it out when I buy my dream home.
  - C . I will buy my dream home by 2015.
  - D . I will open an optical boutique and lab by 2012.
  - E . I will buy and rent a duplex, then upgrade every 2 years, doubling the number of units I have to rent, starting in 2017.
- Home improvements/construction
  - A . My spouse will decorate the interior of the house, which will have a southwestern Spanish style decor.
  - B . The exterior of the house will be styled as a Mexican hacienda with tile roof and balconies.
  - C . I will landscape my home on 5 to 10 acres to include as many of the following as practical:
    - *Swimming pool*
    - *Jacuzzi*
    - *Bench swing*
    - *Fire pit*
    - *Waterfall*
    - *Pond*
    - *Tennis court*
    - *Nursery*
    - *Volleyball court*
    - *Every fruit tree I like*
    - *Eucalyptus grove with tree house*
    - *Barn*
    - *Horses*
    - *Chickens*
    - *Patio with cooking stove and oven*

## APPENDIX C

## SAMPLE OUTLINE OF FUTURE PLANS—cont'd

- Personal
  - A . I will buy a Lexus every 4 years starting in 2011.
  - B . I am not really interested in clothes.
  - C . I will dine out with my spouse once a week.
- Community activities
  - A . I will support church and attend once per week
  - B . I will join service clubs such as Rotary, Kiwanis, and Lions and become active with boy scouts or girl scouts
  - C . I will support the local library and schools annually with donations and services.
- Political office
  - A . I will support organized optometry by attending the AOA and AAO conventions each year.
  - B . I will support candidates at the local level beginning in 2010 to 2020.
  - C . I will run for political office on a local level in 2021.
- Travel
  - A . I will take one road trip along the west coast every year.
  - B . I will travel within the US, choosing sites based on my activities in optometry at first, and then wherever I want to go. My goal is to eventually visit every state in the US and every continent in the world by 2045.
- Recreation
  - A . I will travel internationally every other year (dependent on my optometry lecturing and volunteering on committees) to include Great Britain, Spain, France, China, Australia, Africa, and South America.
- Recreation
  - A . I will play tennis 3 mornings or evenings a week.
  - B . I will play golf 2 mornings or afternoons a week.
  - C . I will bowl in a bowling league and play softball in a league 1 or 2 evenings a week.
  - D . I will write stories, or work on art projects 1 day a week.
  - E . I will join a private country club in 2016.
- Family
  - A . I will be married by 2010.
  - B . I will have 6 children.
  - C . I will change my future plans to be consistent with my spouse.
- Retirement
  - A . I will retire from optometric practice in 2045 and remain practicing 1 day a week.
  - B . At that time, I will have a passive income equivalent to \$100,000 a year in today's dollars.