



5 Steps to Goal Setting with Clients

Purpose: To present a 5 step-process to goal setting with clients.

Lesson Outcome. Trainers will be able to:

- Identify the 5 steps to the goal setting process
- Differentiate between Outcome Goals and Behavior Goals
- Confidently execute the process with their clients

Goal setting is a powerful tool, if it is applied and executed appropriately. To assist your clients in the goal setting process you must be adept at applying it to your own life. This lesson will provide you with the guiding principles necessary to set and achieve quality goals.

When it comes to client goals, it is important to identify both outcome and behavior goals. If we only focus on outcomes, we miss the opportunity to change the behaviors that contribute to achieving a successful outcome. In other words, outcome goals are often beyond the client's control; whereas behavior is within the client's control.

Key Terms

Term	Definition	Example
Outcome Goal	A long-term statement; the main outcome or objective to be achieved.	<i>I want to lose weight in 15 weeks.</i>
Behavior Goal	Statements that outline steps to achieving the outcome.	<i>I will exercise 6 days a week for the next 15 weeks</i>

Step 1. Investigate

Have an open and honest conversation with your clients. Most will come to you with loosely defined goals (such as a non-specific outcome goal) and it is your job to find out the *why* of the outcome goal. What motivates them? What is the significance? Is it to get back in shape after having a baby? Is it to “wow” at a class reunion? Is it externally driven by a doctor as a result of poor blood work results? What is the emotional attachment to their desires? Find out all you can by asking open ended questions.

To Do's:

- Take copious notes.
- Summarize the discussion verbally to the client to check for accuracy in understanding.
- Ask the client to write down the outcome goal.

Step 2: Identify Behaviors

After the outcome goal is discussed and refined, it is your job to help shape the outcome goal by working with the client to identify behaviors (those actions within the client's control) that aid in achieving the intended outcome. Referring back to the earlier example, ***I want to lose weight in 15 weeks***, behaviors that relate to this goal might include the client's commitment to exercise (how often, intensity, etc.) and his/her dietary practices (portion control, fruits and veggie servings, etc.).

To Do's:

- Discuss/brainstorm behaviors with the client.
- Write them down in the form of behavior goals using the SMART-ER Goal Setting method.

Step 3: The SMART-ER Method.

Standard goal setting methods encourage **S**pecific, **M**easurable, **A**chievable, **R**elevant/reward-based, and **T**ime-defined statements. However, I encourage you to take it one step further – make the goal SMART-ER. In other words, let’s also consider the **E**xternal **R**esources needed to support the desired outcome.

External resources are not and should not be limited to physical “things”, but could and should include places, people, and practices. Just because an individual sets a personally meaningful goal does not mean he or she must go it alone or that he or she will be considered successful *only* if that goal is accomplished in isolation from outside or supportive resources. Create a list of tools and external resources that may help you along the way to achieving the objective. See the table below for a few examples.

Tools (possible physical products)	External Resources (places, people, or practices)
Kitchen Scale	Local organizations or community centers that offer affordable or free healthy cooking classes
Measuring Cups/spoons	Reputable social media feeds or newsletters from recognized organizations such as the American Heart Association or the Academy of Nutrition and Dietetics (there are many more).
Smaller plates/bowls	Family members, co-workers, friends for social support
Snack-sized baggies	Pack daily healthy snacks the night before
Spiralizer	Menu Planning

Step 4. Write it Out

Intention (Outcome Goal)	Specific	Measurable	Achievable	Reward	Time/Tool defined	External Resources
What is it that you want to achieve?	Who? What? Why? Where? When?	How much? How often? How many?	Is the goal realistic and reasonable?	How will you reward yourself when you achieve your goal?	By when will you achieve this goal?	What tools or resources are needed to support the overall goal?
<i>Example: To lose weight.</i>	<i>Example: I want to lose 15 pounds in 15 weeks by exercising 6 days a week and managing my portion sizes.</i>	<i>Example: I will plan 60 minutes for exercise on 6 days of the week. I will measure food servings to help me understand portion control.</i>	<i>Example: Given that a healthy weight loss range is 1-2 pounds a week, losing 15 pounds in 15 weeks is achievable and realistic.</i>	<i>Example: I will reward myself with a massage when I reach my goal.</i>	<i>Example: I plan to achieve this goal in 15 weeks.</i>	<i>Smaller plates/bowls Kitchen scale Liquid measuring cup & dry measuring cups</i>
Practice here						

Now, state the final completed goal in paragraph form incorporating each of the elements above.

Example: I will lose 15 pounds in 15 days by committing to exercise 6 days a week for an hour each day and committing to monitoring and controlling my portion sizes. I will reward myself with a massage upon achievement of my goal. I will purchase a kitchen scale, smaller plates and bowls, and measuring tools to help me with portion control.

Step 5. Identifying & Overcoming Obstacles

As with anything, obstacles can and will present challenges. At this point, you will help your clients identify any potential obstacles, barriers, or high-risk situations that may threaten their progress.

Example: I anticipate that the desire to participate in social activities will impact my plan to achieve my goal. I also predict that, with a busy schedule and family, I might not always be able to complete an hour a day of exercise.

Next, discuss strategies for overcoming the identified obstacles, barriers, or high-risk situations.

Example: I will schedule time to exercise first thing in the morning. I will also discuss my goal with my family and ask for their support in keeping me accountable.

Once you complete these 5 steps with your clients, they are ready to pursue their goal or goals. To keep the motivation high, help your clients set a reasonable short-term goal that can be accomplished immediately. Lastly, schedule regular “check-in” meetings with your clients to evaluate their progress. Make changes when necessary.