



HOW DO I UPDATE THE GOALS AND VISION WORKSHEET?

Section Links

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- Submitting the worksheet
- How to complete the PBC assessment?

Navigate to the Goals and Vision worksheet

- This should be the first worksheet updated for the PBC Assessment
- Navigate to the Goals and Vision worksheet
 - In the PBC Assessment there is a menu at the top of the screen
 - Click on 'Goals and Vision' to navigate to the worksheet

PBC Canvas | PBC Dashboards | **Goal & Vision** | Elevation | Specification | Integration | Skill and Will | Productive Paranoia | Paradox |
Candle vs Mirror | Transposition | Mess Finding | Frameworks | Filtration | Coordination | PBC Action Plan

Select the PBC Assessment version to update

- On the left-hand side there is a drop-down menu for you to select the PBC Assessment version
 - Clicking on this will show all PBC Assessment versions

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✓ Version 4 - 2021-02-27

GOALS & VISION WORKSHEET

How Do I Update the Goals and Vision Worksheet Guide

- From this list, select the current (active/open) PBC Assessment version

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Version 1 - 2021-02-26
Version 2 - 2021-02-26
Version 3 - 2021-02-26
✓ Version 4 - 2021-02-27

GOALS & VISION WORKSHEET

- You will be taken to the selected version

PBC Canvas | PBC Dashboards | **Goal & Vision** | Elevation | Specification | Integration | Skill and Will | Productive Paranoia | Paradox |
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GOALS & VISION WORKSHEET

Assessment Date: * Name: *

GOALS +

VISION +

VISIONING LANDSCAPE +

SAVE

SUBMIT

- Version 1 is the first version of the PBC Assessment
- If this has not been closed/completed then there will only be 'Version 1' in the drop-down menu
- The highest version number is the current version
- If there is an option to '[Start a new version](#)' then all PBC Assessment versions are closed/completed and a new version needs to be started
 - This option only displays if there are no open PBC Assessments
 - None of the PBC Assessment versions displayed can be updated
- Note:**
 - There can only be one active or current PBC Assessment open at any one time
 - All completed PBC Assessment versions can be viewed but cannot be updated
 - Only the current PBC Assessment version can be updated, as it has not been closed/completed

How Do I Update the Goals and Vision Worksheet Guide

Sections in the worksheet

- There are three sections in the Goals and Vision worksheet
- These are:
 - Goals
 - Vision
 - Visioning Landscape

PBC Canvas | PBC Dashboards | [Goal & Vision](#) | [Elevation](#) | [Specification](#) | [Integration](#) | [Skill and Will](#) | [Productive Paranoia](#) | [Paradox](#) | [Candle vs Mirror](#) | [Transposition](#) | [Mess Finding](#) | [Frameworks](#) | [Filtration](#) | [Coordination](#) | [PBC Action Plan](#)

Version 4 - 2021-02-27

GOALS & VISION WORKSHEET

Assessment Date: *

Name: *

- GOALS +
- VISION +
- VISIONING LANDSCAPE +

SAVE

SUBMIT

Order to complete the worksheet

- The easiest way to complete the worksheet is to complete each of the sections in order
- There may be some questions that require the answers from previous questions

Mandatory questions

- Questions with a red asterisk (*) are mandatory and must be answered for the worksheet to be submitted and validated successfully
 - All worksheets need to be submitted and validated to complete and end an assessment
 - This is required to start a new PBC Assessment
- For the Goals and Vision worksheet the following questions are mandatory:
 - Q1, Q2, Q3, Q4, Q5, Q6 and Q7

How Do I Update the Goals and Vision Worksheet Guide

Answering the questions for each section

- To answer questions in each section, expand the section
 - Clicking on the '+' symbol for the section expands it
 - Once expanded clicking on the '-' symbol for the section contracts it
- When the section is expanded answer all questions
- Each section in the worksheet is covered below

How Do I Update the Goals and Vision Worksheet Guide

1. Goals section

- There are five questions in this section
 - All questions in this section are mandatory

GOALS

1. What is it that you want to achieve or do? *

2. Is this related to your personal life, professional life or both? *

Both

3. By when do you want to achieve this? *

dd/mm/yyyy

4. Why is this important to you? *

5. What are your top 1 to 3 goals related to this and how will achieving these make you feel? *

Top 3 Goals	How will you feel if you achieve these?

Question #	Answer The Question By
1	Enter the answer by typing your response in the text box space provided
2	Using the drop-down menu provided
3	Using the date picker provided
4	Enter the answer by typing your response in the text box space provided
5	Enter the answer by typing your response in the text box space provided

- **Q1:** outline what you want to achieve
- **Q2:** indicate if this is related to your personal life, professional life or bot
- **Q3:** select the date by when you want to achieve it
- **Q4:** explain why this is important to you
- **Q5:** state your top three, or up to three, goals and how you will feel when you achieve them
 - To answer the question, in:
 - **Column 1:** state you goal - include one goal per row
 - **Column 2:** describe how you will feel when you achieve the goal
 - A **minimum** of **one** answer is required for this question (i.e. one row)
 - A **maximum** of **three** answers can be included for this question (i.e. three rows)

How Do I Update the Goals and Vision Worksheet Guide

GOALS —

1. What is it that you want to achieve or do? *

2. Is this related to your personal life, professional life or both? *

3. By when do you want to achieve this? *

4. Why is this important to you? *

5. What are your top 1 to 3 goals related to this and how will achieving these make you feel? *

Top 3 Goals	How will you feel if you achieve these?
Goal 1	Enter information
Goal 2	Enter information
Goal 3	Enter information

How Do I Update the Goals and Vision Worksheet Guide

2. Vision section

- There are two questions in this section
 - All questions in this section are mandatory

VISION

6. Describe your vision of what amazing looks like *

7. Describe your vision for how this will transpire in 1 year, 3 years and 5 years in terms of how you see yourself, your life or your career. Then identify any things that will help you get there (helpers) and things that could hinder you getting there (barriers): *

	1 Year	3 Year	5 Year
Where do you see your career, business or life			
Things to do to achieve this			
Helpers			
Barriers			

Question #	Answer The Question By
6	Enter the answer by typing your response in the text box space provided
7	Enter the answer by typing your response in the text box space provided A tool-tip is available for Helpers and Barriers

- **Q6:** describe what your version of amazing looks like
- **Q7:** break this down into achievable steps over the next 1 Year, 3 Years and 5 Years
 - To answer the question, in:
 - **Row 1 - where you see yourself:** explain where you want your business, your career or yourself to be in the next 1, 3 and 5 years
 - **Row 2 - things to do to achieve this:** describe the things that need to happen to get to where you want to be in the next 1, 3 and 5 years
 - **Row 3 - helpers:** outline the things that can help you get where you want to be in the next 1, 3 and 5 years
 - There is a **tool-tip** available for Helpers
 - **Row 4 - barriers:** outline the things that may hold you back from getting where you want to be in the next 1, 3 and 5 years
 - There is a **tool-tip** available for Barriers
 - The information for the **1 Year** column **must** be updated however you should also updated the columns for 3 Years and 5 Years as well

How Do I Update the Goals and Vision Worksheet Guide

VISION			
6. Describe your vision of what amazing looks like *			
<input type="text" value="Enter info"/>			
7. Describe your vision for how this will transpire in 1 year, 3 years and 5 years in terms of how you see yourself, your life or your career. Then identify any things that will help you get there (helpers) and things that could hinder you getting there (barriers): *			
	1 Year	3 Year	5 Year
Where do you see your career, business or life	Enter information	Enter information	Enter information
Things to do to achieve this	Enter information	Enter information	Enter information
Helpers	Enter information	Enter information	Enter information
Barriers	Enter information	Enter information	Enter information

How Do I Update the Goals and Vision Worksheet Guide

3. Visioning Landscape section

- There is one question in this section
 - The question in this section is not mandatory

VISIONING LANDSCAPE

8. Plot the things that need to happen on the visioning landscape canvas below to outline what needs to Happen in the short-term and long-term to achieve your goals that range from the realistic (I.E. Pragmatic) to The higher level or more difficult things to achieve amazing.

AMAZING

SHORT TERM <

> LONG TERM

REALISTIC

Question #	Answer The Question By
8	Enter the answer by typing your response in the text box spaces provided

- **Q8:** this is a canvas where you can map out some things you can do in the short-term and the long-term, that are both pragmatic/realistic/practical as well as more difficult/harder/amazing to do things, that can help you achieve your goals and get to where you want to be
 - Enter an answer into the relevant text box according to the timeframe (horizontal axis) and level of difficulty (vertical axis)

VISIONING LANDSCAPE

8. Plot the things that need to happen on the visioning landscape canvas below to outline what needs to Happen in the short-term and long-term to achieve your goals that range from the realistic (I.E. Pragmatic) to The higher level or more difficult things to achieve amazing.

AMAZING

SHORT TERM <

> LONG TERM

REALISTIC

How Do I Update the Goals and Vision Worksheet Guide

Saving the worksheet

- If you don't have time to complete the worksheet in full, once you've entered your answers, select the 'Save' button
 - This will ensure your work is saved and does not need to re-entered
 - After selecting 'Save' a success message displays

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Answers for the Goal & Vision have been saved successfully.

✓ Version 4 - 2021-02-27

GOALS & VISION WORKSHEET

Assessment Date: * 2021-02-27

Name: * Tiana Weasley

GOALS +

VISION +

VISIONING LANDSCAPE +

SAVE

SUBMIT

- However, the 'Save' button does not validate the completeness of the worksheet or verify it has been completed
 - This is indicated by the name of the worksheet in the menu still appearing with a red dot next to it
- To do this, and to complete the worksheet, it needs to be submitted by selecting the 'Submit' button
- You can update the worksheet as often as required and then save it
- Amendments and updates can be made until the PBC Assessment has been finalised
 - This can only be done in the [PBC Action Plan](#) worksheet
 - And is usually done at the end of the assessment period (i.e. end of the quarter)

How Do I Update the Goals and Vision Worksheet Guide

Submitting the worksheet

- After all questions in the worksheet have been answered, select the 'Submit' button
 - This validates all questions have been answered and saves the worksheet
 - If all questions are answered, a success message displays and the name of the worksheet no longer has a red dot next to it in the menu

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Answers for the Goal & Vision have been submitted successfully.

✓ Version 4 - 2021-02-27

GOALS & VISION WORKSHEET

Assessment Date: *

2021-02-27

Name: *

Tiana Weasley

GOALS +

VISION +

VISIONING LANDSCAPE +

SAVE

SUBMIT

- You can update the worksheet as often as required, even after it has been submitted, and then resubmit the worksheet
- Amendments and updates can be made, and the worksheet resubmitted, until the PBC Assessment has been finalised
 - This can only be done in the [PBC Action Plan](#) worksheet
 - And is usually done at the end of the assessment period (i.e. end of the quarter)
- To finalise and end the assessment, so a new assessment can be started, all worksheets need to be fully completed and submitted by selecting the 'Submit' button for **every** worksheet
 - You will know if any worksheets need to be submitted as the name of the worksheet will display with a red dot next to it in the menu

How Do I Update the Goals and Vision Worksheet Guide

How to complete the PBC assessment?

- There is a recommended sequence to complete the PBC Assessment worksheets
- This is outlined in the '[Complete the PBC Assessment](#)' How Do I Guide
- For more information on saving or submitting worksheets, starting or ending an assessment and updating every worksheet, refer to the following How Do I Guides:
 - '[Save Worksheets in the PBC Assessment](#)'
 - '[Submit Worksheets in the PBC Assessment](#)'
 - '[Start a New PBC Assessment](#)'
 - '[Update the Elevation Assessment Worksheet](#)'
 - '[Update the Specification Assessment Worksheet](#)'
 - '[Update the Integration Assessment Worksheet](#)'
 - '[Update the Skill and Will Assessment Worksheet](#)'
 - '[Update the Productive Paranoia Assessment Worksheet](#)'
 - '[Update the Paradox Assessment Worksheet](#)'
 - '[Update the Candle versus Mirror Assessment Worksheet](#)'
 - '[Update the Transposition Assessment Worksheet](#)'
 - '[Update the Mess Finding Assessment Worksheet](#)'
 - '[Update the Frameworks Assessment Worksheet](#)'
 - '[Update the Filtration Assessment Worksheet](#)'
 - '[Update the Coordination Assessment Worksheet](#)'
 - '[Update the PBC Action Plan Worksheet](#)'