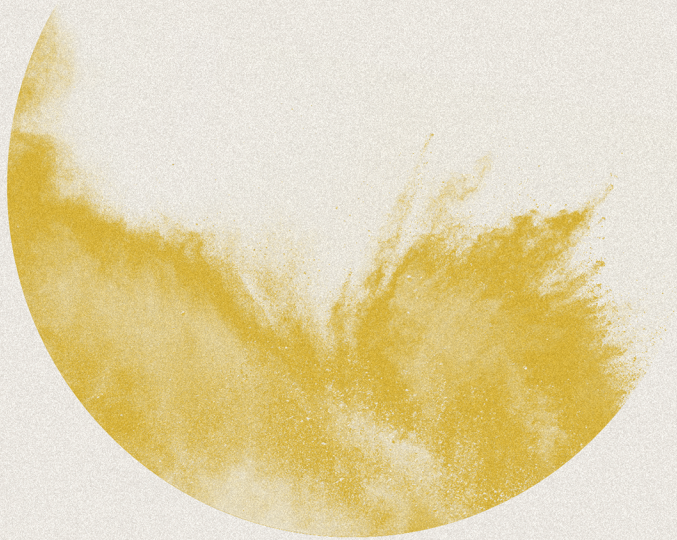


Y O U R  
*BEST YEAR*  
E V E R



— COURSEBOOK —

Y O U R  
*BEST YEAR*  
E V E R  
C O U R S E B O O K

NAME \_\_\_\_\_

# Welcome

Congratulations on taking a huge step toward making this your best year ever! We are thrilled to welcome you to the program. We can't wait to hear what you'll achieve this year as a result of what you learn. The curriculum is concentrated and intended to get you up and running toward your goals faster than you ever thought possible. As you prepare to begin, here are four tips to help you get the most out of this course:

- 1 MAKE AN APPOINTMENT WITH YOURSELF.** You've heard it before; if it doesn't get scheduled, it doesn't get done. So, right now, before you do anything else, block out one hour a day for the next five days. You can also sprint through the entire course in a single day if that fits your schedule. Either way, make an appointment.
- 2 KEEP YOUR HEART AND MIND OPEN.** Goal-setting involves our hopes, dreams, and aspirations. It can feel vulnerable to entrust those to a program or a system, especially if you've suffered disappointment in the past. We get it, but suspend disbelief. An open heart and mind is crucial for the kind of engagement that drives achievement.
- 3 USE THIS COURSEBOOK.** This coursebook is designed to help you internalize and implement what you learn in the course. To make the most of it, take notes as you go and finish the exercises. We've included some bonus elements in the coursebook not mentioned in the course videos. Our guess is you'll find these few extras super helpful.
- 4 FINISH THE COURSE.** How often have you bought a book or course and then let it collect dust on the shelf (or on your hard drive)? Not this time! Make the commitment that you will complete all five lessons no matter what. Show up for yourself. Your transformation depends on it.

If you follow these tips, you will be on your way to having your best year ever.

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# INTRODUCTION

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*Welcome to Your Best Year Ever!* Do you dream of reaching your full potential? Do you have aspirations you want to transform into achievements? Are you hungry for more in life? We bet you're here because the answer is yes.

You probably know this, but people are more likely to pursue new achievements based on big moments on the calendar. New Year's Day, birthdays, life transitions—all these inspire people to set big, new goals. Researchers call this "the fresh-start effect." In fact, there's a huge spike in internet searches for goal-related buzzwords around January 1.

Maybe that's why you're here. Whether this last year was a trial you want to put past you or a triumph that spurs you on to reach for even more, this course is for you. When it comes to the future, the potential is limitless. Of course, hard realities won't just disappear because the calendar changes, and new challenges are sure to arise in the year ahead, but we all have the power to make this next year our best year ever. In the end, it comes down to you. You determine your future.

*In the end, it comes down to you.  
You determine your future.*

Let go of your current circumstances for a moment and imagine it's twelve months from now. What does your future look like? To answer that question, think about the ten primary domains of life:

|           |              |            |             |            |
|-----------|--------------|------------|-------------|------------|
| SPIRITUAL | INTELLECTUAL | EMOTIONAL  | PHYSICAL    | RELATIONAL |
| PARENTAL  | SOCIAL       | VOCATIONAL | AVOCATIONAL | FINANCIAL  |

What do you hope for in each of these life domains? Whatever has happened in your past—good or bad—it's possible to make this your best year ever, even in those areas where you've suffered serious setbacks. Your Best Year Ever will show you how.

It is not that we have a short time to live, but that we waste a lot of it.

SENECA

The program is based  
on four key assumptions.

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**1 THE FUTURE HASN'T HAPPENED YET, AND YOU HAVE POWER IN THE PRESENT TO MAKE A POSITIVE IMPACT.** There is more on this in Lesson 1, but it's important to state at the beginning. As long as it's today, you have the ability to make a difference in tomorrow.

**2 SUCCESS IN LIFE REQUIRES ATTENTION ACROSS THE KEY DOMAINS OF LIFE—WORK, HEALTH, RELATIONSHIPS, AND OTHERS.** Why? Because all of life's domains are interconnected. Your physical condition impacts your work; stress at work impacts life at home; life at home affects your emotional well-being; and so on. All this interplay means you have to give each domain appropriate attention if you want to experience your best year ever. The good news is that you can improve any life domain, no matter how far off track you've been. You don't have to settle for what is. Progress is possible.

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#### NOTE

*There is a quick and easy online quiz called the LifeScore Assessment to help you get a sense of where you are right now in all of your life domains. If you haven't taken that already, take a minute and do it before you dive into the course. You can access it at [bestyearever.me/lifescore](https://bestyearever.me/lifescore).*

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**3 TRANSFORMING ASPIRATIONS INTO ACCOMPLISHMENTS IS ABOUT MORE THAN ACHIEVEMENT; IT'S ABOUT PERSONAL GROWTH.** Having your best year ever depends on the personal growth you experience along the way. When it comes to goals, the destination is great. But it's the journey that changes us. The path isn't always easy. Goals are supposed to push you beyond your comfort zone into your discomfort zone. And that's where growth happens—where you're forced to realize your potential and develop your character and capabilities. As you aspire to achieve something more and better, you become something more and better in the process.

Sometimes, you have to look back in order to understand the things that lie ahead.

YVONNE WOON

- 4 YOU NEED A SET OF WRITTEN GOALS TO GUIDE YOU.** Why written? You've likely heard about the famous Ivy League study that shows writing down your goals helps you achieve them. You've probably also heard it's phony—as in, totally made up. When people find that out, they sometimes think the benefits of written goals are phony too.

But no. Professor Gail Matthews of Dominican University of California did her own study. She tracked more than 250 people from all walks of life. Everyone from entrepreneurs, executives, and lawyers to teachers, artists, and people from various other professions. At the end of the study, she found that you have a 42 percent *greater* chance of achieving your goals if you just write them down.

Written goals are the foundation for success. Why? Writing forces you to clearly define what you want. It transforms a vague ambition into a bullseye. Having that kind of clarity helps you connect with your goals on an intellectual and emotional level. It builds resolve for when the going gets tough. Writing also motivates you to take action and reminds you to keep going. As you review your written goals, it prompts you to pursue the next most important step.

Everyone has fears and frustrations based on the past. It would be easy to address them by making some New Year's resolutions. But resolutions don't work. We know that. Most resolutions focus on what we were unable to achieve last year. Setting resolutions might make you feel good in the moment, but they tend to fade very quickly. Before long, we forget all about them. Worse, when we do think about them, we feel like a failure all over again. Finally, we self-sabotage and decide change is impossible. If you want a fresh start that turns into your best year ever, you need a proven goal-achievement system.

*You need a proven goal-achievement system.*

Based on the four key assumptions we just covered, this course will show you how to turn your hopes for the coming year into an actionable plan that can become your new reality.

Everybody ends up somewhere in life. A few people end up somewhere on purpose.

ANDY STANLEY

## There are five lessons.

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**LESSON 1** reveals three truths about your beliefs that will help you overcome doubts. This lesson will show you how to shed limiting beliefs and imagine what a breakthrough year might mean for your life.

**LESSON 2** will show you how to get closure on your past and step more confidently into your future. We will give you a four-step system to analyze the past for what worked—and what didn't—so you can move forward and design the year to come. A year that excites you. A year that promises more growth and achievement than you might even believe is possible.

**LESSON 3** introduces a seven-part framework for setting well-designed goals that work. These goals will become a guiding vision for the months ahead. This proven framework will give you a portfolio of meaningful, effective, written goals that you can tackle right away.

**LESSON 4** helps you define the most powerful motivator there is: your why. Once you nail this piece, you'll be unstoppable.

**LESSON 5** covers the proven tactics and the daily actions necessary to help you accomplish the goals you've set.

## When you're done with Your Best Year Ever, you'll have:

- a powerful sense of what's possible in the coming year;
- closure on the past year and a renewed sense of hope and gratitude;
- a written set of goals that inspire you to take action;
- a clear and compelling rationale for sticking with your goals when the going gets tough; and
- proven implementation tactics to take your goals from dream to done.



To get started, complete **EXERCISE 1** on the following page. Take some time to list your wins for the past year. Then, write down your hopes and dreams for the coming year. Once you're done, feel free to jump into **LESSON 1**.

ERICA JONG

EXERCISE 1

LAST YEAR'S WINS

INSTRUCTIONS AND EXAMPLE

It's vitally important to start with the positives. Use the space on the next page to list your wins from the past year. Despite whatever challenges you may have faced, there are always some wins! Write them down, and take a moment to celebrate them.

EXERCISES

LAST YEAR'S WINS

- I paid off my car!
- I walked for thirty minutes five days a week.
- I instituted a weekly date night with my husband.
- I read twelve books.
- I taught my son how to skate.
- I started going to a counselor.
- 
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-

## LAST YEAR'S WINS

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

EXERCISE 1

NEXT YEAR'S HOPES AND DREAMS

INSTRUCTIONS AND EXAMPLE

Use the space on the following pages to jot down your hopes and dreams for the next year. Start by asking, *What do I want in each of the ten domains in the next year?* You can dream out even further than that, but we really want you to focus on this year before us and consider what positive movement would look like over the next twelve months for each of the primary life domains. Getting clarity on your desires in multiple life areas is crucial to establishing the trajectory of your breakthrough year.

Try not to get bogged down with questions of what's possible. The important thing is to let your mind run, let your imagination go free, let your heart speak. What do you hope? What do you want for each of these areas of your life?

SPIRITUAL

I want to join a prayer group and meet with them on a regular basis.

I want to become more involved in my church community.

INTELLECTUAL

I want to learn how to become a better writer.

I want to learn more about the Enneagram and about what motivates me so I can be more emotionally intelligent.

EMOTIONAL

I would like to consistently journal and reflect on what I'm grateful for.

I want to find a good counselor and work on some ways to better manage my anxiety.

PHYSICAL

I want to learn how to fence.

I want to start strength training consistently.

I want to get 7-8 hours of sleep every night.

RELATIONAL

I want to have regular date nights with my partner.

**SPIRITUAL**

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**INTELLECTUAL**

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**EMOTIONAL**

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**VOCATIONAL**

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**AVOCATIONAL**

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**FINANCIAL**

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Find the good. It's all around you. Find it, showcase it, and you'll start believing in it.

JESSE OWENS

## LESSON 1

# *BELIEVE THE POSSIBILITY*

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The biggest barriers we face in creating the lives we want are the ones inside our own heads. In this lesson, we're going to look at how your beliefs shape your thoughts and actions—especially how they limit you. When it comes to creating your best year ever, it's important to recognize three truths about your beliefs.

### TRUTH 1

#### **YOUR BELIEFS SHAPE YOUR REALITY.**

---

We tend to experience what we expect. Because our expectations shape what we believe is possible, they shape our perceptions and our actions. That means they also shape the outcomes. And that means they shape our reality. It's true that there are times when external circumstances make our original goals no longer possible. But our success ultimately depends on our ability to tell the difference between reality and the story we are telling ourselves.

*We tend to experience what we expect.*

One of the biggest reasons we don't achieve our goals is we've convinced ourselves they're impossible. We believe our goals are out of reach. Studies of various lifestyle issues, including smoking cessation, alcohol use, and exercise all delivered the same finding: When we believe we can make a positive change in our lives, we're much more likely to be successful. But when we believe we can't, we don't. The difference is all in our heads.

Why? It's sad but simple. When we've experienced a number of setbacks in life, we begin to develop limiting beliefs about ourselves. We start seeing ourselves as less capable or less intelligent than others. We may begin to think we're just unlucky or that good things will never happen to us. And those beliefs actually inhibit us from trying, let alone succeeding in, setting goals.

Whatever you are meant to do, do it now. The conditions are always impossible.

DORIS LESSING

It's a self-defense mechanism. The one sure way to never get your hopes dashed is to never get them up to begin with. But that kind of cynicism poisons our souls and limits our success. The stories we tell ourselves have a direct impact on the reality we experience.

So, the question becomes, what adjustments to your thinking might change your sense of what's possible? Sounds simple. But it makes a big difference. Changing your thinking is like flipping a switch. It creates a new sense of possibility.

#### TRUTH 2

#### SOME BELIEFS HOLD YOU BACK.

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Have you ever been around someone with a really negative attitude? They tend to gripe about everything. They seem convinced things will never turn out in their favor. Their basic mindset is that the world is out to get them. So they're always on guard. People like this will leave you feeling drained and diminished. They're the perfect example of something called *scarcity thinking*.

Now turn the dial all the way over to the other side. There are also people who work at being a source of warmth and encouragement. They treat everyone with respect and integrity. And they're able to focus on the good in others. They invest in other people's success. And it usually comes back to them tenfold. When you're around people like this, you feel energized and affirmed. This is *abundance thinking*.

| *Mindsets are changeable.*

The distinction is important, because every goal you set will have obstacles. Scarcity thinkers approach those obstacles assuming defeat. They think their abilities are set in stone, and they really can't improve very much. But when abundance thinkers hit an obstacle, they don't quit. They just look for new approaches to the problem. They're confident they can figure it out if they just work harder, or come at it from a different direction.

Because of how they view the world, scarcity thinkers tend to be risk averse, complacent, and prone to quit. They're usually reluctant to even try. Meanwhile, abundance thinkers tend to be adventurous, ambitious, persistent, and eager to try new things.

These traits are more than personality. These are learned ways of thinking about the world. And, importantly, these mindsets are changeable.

Above all, don't lie to yourself.

FYODOR DOSTOEVSKY

## 3 KINDS OF LIMITING BELIEFS



ABOUT THE WORLD



ABOUT OTHERS



ABOUT OURSELVES

It's helpful to think of three kinds of limiting beliefs.

- 1 **BELIEFS WE HOLD ABOUT THE WORLD.** Somebody might say, "I can't start a new business right now; the market is terrible." Or, "Politics never make a difference; it doesn't matter if I vote." Or, "Management doesn't care about people like me; it's impossible to get ahead." These can be very deep-seated beliefs. And maybe they're based on real experience. But they're rarely the whole truth, even when they seem accurate.
- 2 **BELIEFS ABOUT OTHERS.** Someone might say, "It's no use asking; he's too busy to meet with me." Or, "She's less experienced; what could she possibly teach me?" Or, "He hasn't responded yet; he must be upset with me."
- 3 **BELIEFS ABOUT OURSELVES.** We might say, "I'm a quitter; I never finish what I start." Or, "I can't help it; I've never been physically fit." Or, "I'll never dig out of this hole; I've always been terrible with money." Since we tend to experience what we expect, beliefs like these are sure to block any progress you want to make in life.

Where do these limiting beliefs come from? As mentioned, some come from previous failures. Repeated setbacks can train us to assume the worst. They condition us to hoard what we have and avoid risks. But if we're observant, we can spot other influences.

Take social media. Research demonstrates a relationship between time spent on social media and feeling bad. We're either not measuring up to people's staged, edited, filtered version of their lives, or we're swimming in toxic conversations about the state of the world.

Whatever you think can't be done, somebody will come along and do it.

THELONIOUS MONK

Our family and peers also have an impact. Parents, siblings, friends, coworkers, neighbors, church communities, professional networks—they all play a part. Hang around scarcity thinkers, and you may start seeing the world from their perspective. The reverse is also true. Surround yourself with abundance thinkers, and everything starts looking up.

The root of our limiting beliefs can also be personal. In his book *Making Habits, Breaking Habits*, Jeremy Dean mentions three ways we can construct limiting beliefs.

- 1 **BLACK-AND-WHITE THINKING.** We assume we're failures if we don't achieve perfection, even though reality is usually a sliding scale, not a toggle switch.
- 2 **PERSONALIZING.** We blame ourselves (or others) for random negative occurrences.
- 3 **CATASTROPHIZING.** We assume the worst, even with little evidence.

*And let's add a fourth to the list:*

- 4 **UNIVERSALIZING.** We take one bad experience and assume it'll hold true across the board.

These four belief constructs are common, because they are easy frameworks for understanding the world. People are sensemakers. We need to make sense of all the random experiences and information we encounter in the world. So, we have set stories that we tell ourselves to connect the dots and create certainty.

These might be true in certain instances, but they're usually not. At least not completely. We default to them, because it's mentally less taxing. It's easier to organize life into a familiar storyline, even if it's negative, than to craft a different, more nuanced belief.

*We have the power to change our beliefs about the world, others, and ourselves.*

Thankfully, we have the power to change our beliefs about the world, others, and ourselves.



## TRUTH 3

## YOU CAN UPGRADE YOUR BELIEFS.

We all have had limiting beliefs like the following at one time or another.

"I don't have enough experience."

"I can't write."

"I always quit."

"I'm terrible with technology."

"I'm not good with money."

"I've hit the ceiling in my career."

"I'm not self-disciplined."

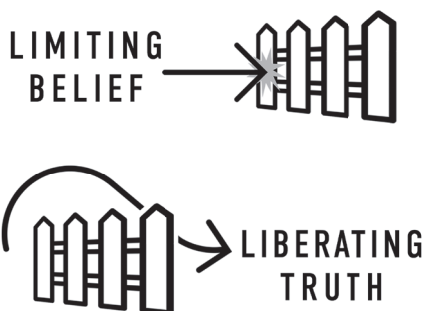
"I'm not creative."

"I'll never repair that relationship."

"I'm not smart enough."

"I always fail sooner or later."

"I'll never be able to bounce back from this failure."



The list goes on. There are as many limiting beliefs as there are people—times at least ten. Here is a simple six-step process to help you upgrade those limiting beliefs.

- 1 **RECOGNIZE THE LIMITING BELIEF.** These beliefs could be about the world, others, or yourself. And they might come from past experience, the media, or your social circle. The point is to call them out. Do you have areas where scarcity thinking shows up? It might indicate a limiting belief. You can also look at Bonus 1 at the end of this lesson for a listing of the differences between scarcity and abundance thinking.
- 2 **RECORD THE BELIEF.** We all have our own challenges. Whatever your limiting beliefs, record them word for word. By writing them down, you externalize them. Now you're free to evaluate them.

You don't always control your circumstances, but you can always control your response.

JAMES MATTIS

- 3 **INTERROGATE THE BELIEF.** Start by evaluating whether the belief is true. Also ask whether it is useful or empowering. Try to look at it objectively. Is it enabling you to accomplish the outcomes you want, or is it preventing you from doing so?
- 4 **REJECT OR REFRAME THE BELIEF.** If a limiting belief is simply false, you can just reject it. But most limiting beliefs aren't simply false. There's usually enough truth in them that makes them hard to deny. But just because a limiting belief is partly true—or even all true—that doesn't mean you have to settle for it. You can reframe it. Maybe you think, *I'm not a "details" person*. Fine. Is that really necessary? You could accept that it is and stall out. Or, you could reframe it and say something like this: "I'm not a 'details' person, but I can collaborate with someone who is or outsource the details."
- 5 **REVISE THE BELIEF.** This is about reorienting your thinking around a new and liberating truth. If, for instance, you think, *I'm too old to be considered for that job opportunity*, you might say, "I have more experience than other candidates." Conversely, if you think, *I'm too young for that job*, you might say, "I've got more energy and enthusiasm than other candidates." Imagine the difference a perspective shift stands to make in a job interview. The old belief holds you back. The new one gives you a foothold for real progress.
- 6 **REORIENT YOURSELF TO THE NEW BELIEF.** Your new belief might feel awkward, or not even fully true. That's fine. The trick is to start living as *if* it's true. Put the new belief to work. Every time the old belief crops up, reject or reframe it, and restate the liberating truth. The more you do so, the more you'll bring your experience into alignment with your expectations.

So, what are your limiting beliefs? The future is a blank canvas for you to design however you choose. Take control of your thoughts, and create the life you want!

*The future is a blank canvas for you to design however you choose.*



Turn to **EXERCISE 2** on page 32, and use this process to work through some of your limiting beliefs.

Life's ups and downs provide windows of opportunity to determine your values and goals.

MARSHA SINETAR

BONUS 1

Scarcity vs.  
Abundance

SCARCITY THINKERS ARE

- Risk averse
- Complacent
- Stagnant
- Self-limiting
- Closed
- Prone to quit
- Defeated
- Cynical
- Fatalistic
- Stingy
- Tightfisted
- Self-protective
- Defensive
- Fixed

ABUNDANCE THINKERS ARE

- Adventurous
- Ambitious
- Growth-minded
- Resourceful
- Open
- Persistent
- Undefeated
- Hopeful realists
- Optimistic
- Generous
- Openhanded
- Openhearted
- Open to correction
- Changeable

BONUS 2

2 Common  
Limiting Beliefs

We want to encourage you by addressing two limiting beliefs we hear all the time in our coaching program. The first is: *I don't have any power to change a given set of circumstances.* Maybe, but only rarely. We do all have some degree of agency.

According to Stanford University psychology professor Albert Bandura, that agency has four characteristics.

- 1 INTENTION. We can imagine a better reality than the one we're currently experiencing. And we can work with others and within our circumstances to achieve it.
- 2 FORETHOUGHT. By visualizing the future, we can govern our behavior in the present and give purpose and meaning to our actions.

- 3 **ACTION.** We have the ability to act on our plans, to stay motivated, and respond in the moment to remain on course.
- 4 **SELF-REFLECTION.** We not only act, we *know* we act. That means we can evaluate how we're doing, make adjustments, and even revise our plans. As you go through Your Best Year Ever, you'll see that all four of these characteristics are baked into goal achievement. Whatever our circumstances, we have the power to pursue a better future.

The second common limiting belief is: *I don't have the resources I need to succeed.* That feeling is understandable, but let's be clear about this upfront. Resources are never a prerequisite for success. In fact, if you've already got everything you need to achieve your goal, you're aiming too low. (More about that in Lesson 3.)

The truth is that constraints can trigger a cascade of unforeseen rewards. A supposed lack of resources not only spurs resourcefulness, it also builds resilience and confidence. The more times we overcome difficulties, the more capable we are of overcoming whatever comes next.

Some entrepreneurs build this into their whole approach. For example, chef René Redzepi was raised in poverty yet still grew up to become the creative genius behind Noma, which has been recognized four times as the World's Best Restaurant.

His creative strategy uses limitations as inspiration. His team is only allowed to use ingredients that grow in Nordic countries, where the cold season lasts from January until April and vegetation is sparse. They forage for and harvest their own ingredients. The constraints of their environment often push them to innovate, resulting in surprising and unique culinary alternatives to conventional cooking ingredients.

Redzepi has built his reputation around trying and experimenting with foods other chefs won't touch. He says, "Creativity is the ability to store the special moments, big or small, that occur throughout your life, then being able to see how they connect to the moment you're in. When past and present merge, something new happens." Redzepi made the most of his constraints and is now regarded as one of the most influential chefs in the world.

Constraints don't have to be your enemy. They are like the boundary lines in a game. Think football or basketball. The sidelines don't limit the game, they make the game possible in the first place. And it's within those constraints that games are won.

EXERCISE 2

*LIMITING BELIEFS VS. LIBERATING TRUTHS*

INSTRUCTIONS AND EXAMPLE

On the following page, list your top three limiting beliefs about the world, others, and yourself. Do a little soul searching here. Refer to the hopes you listed for the life domains in Exercise 1, and consider what limiting beliefs have maybe hindered you from fulfilling your potential here in the past. Don't beat yourself up. Just recognize those beliefs for what they are.

Next, replace each limiting belief with a liberating truth. We're talking about rejecting, reframing, and revising here. Look at your limiting beliefs and ask yourself: what's a more useful, resilient, or empowering way to think about the world, others, or myself?

|        | LIMITING BELIEFS  | LIBERATING TRUTHS   |
|--------|---|---|
| WORLD  | We can't launch a new product in this economy. There's too much risk! | We can take steps to validate our idea and mitigate the risk.                   |
| OTHERS | Our company's culture makes it impossible to take time off.           | I can take steps to disconnect wisely-- and I'll return to work more energized. |
| SELF   | My schedule makes it impossible for me to get regular exercise.       | There is enough time to accomplish what matters most to me.                     |

|        | LIMITING BELIEFS | LIBERATING TRUTHS |
|--------|------------------|-------------------|
| WORLD  |                  |                   |
| OTHERS |                  |                   |
| SELF   |                  |                   |

## LESSON 2

# COMPLETE THE PAST

---

After limiting beliefs, the past is the most common barrier we encounter. Some of us drag around the past like a trailer full of broken furniture. We can't really consider what's next, because we're too tied up in what's already happened. We have to be willing to face our past in order to build a stronger future.

Nobel-winning psychologist Daniel Kahneman and Dale Miller put it this way: "Reasoning flows not only forward, but also backward, from the experience to what it reminds us of or makes us think about." They call this "the power of backward thinking." And in this lesson we're going to harness that power for ourselves.

*We have to be willing to face our past in order to build a stronger future.*

The US Army has a powerful backward-thinking process we can use for our own purposes. It's called the After Action Review, and it was first developed in 1981. America's armed forces have been using it ever since to improve performance and get better at what they do.

Marilyn Darling, Charles Parry, and Joseph Moore studied the After Action Review process and published their findings in the *Harvard Business Review*. They give the example of a training battle in which one team completely outmaneuvered and defeated the other. To learn from the defeat, the trainers conducted an After Action Review. They studied what went wrong, what went right, and how to adjust their approach in the future. In fact, the losing team's commander called it "a good rehearsal" for battlefield engagements.

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### NOTE

*The process in this lesson is designed to help you deal with routine setbacks and frustrations. It can even help you deal with a whole stack of them. But it's not designed to help you deal with serious trauma. If you need to bring in outside resources like a therapist, please do. For some of us, processing our disappointments and setbacks can suffice. But this can be tough. A lot of past students report feeling strong emotions during this exercise. Those feelings are real, and you shouldn't be alarmed or put off if they come to you. After all, you're dealing with life as it happened, not as you wished it would have happened. You might unearth real and serious disappointments. And you might find it helpful to utilize help outside of what this course can offer.*

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Instead of letting your hardships and failures discourage or exhaust you, let them inspire you. Let them make you even hungrier to succeed.

MICHELLE OBAMA

Why is this important? Because completing the past is all about moving into the future. As the authors of the *HBR* study said, an After Action Review is "a living, pervasive process that explicitly connects past experience with future action."

The goal of After Action Reviews is to understand what happened, why it happened, and how to improve. Lots of businesses use this process, and we can use it too. This kind of "backward thinking" will put you in the right frame of mind as you get ready to design your future and experience your best year ever.

## The After Action Review process includes four principal steps.

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### STEP 1 STATE WHAT YOU WANTED TO HAPPEN.

This is pretty straightforward. Think of it as your battle plan or the object of the mission. This could be your list of goals from the prior year. It could also be something less definite. Maybe it's just an unstated hope or an aspiration. Start by asking yourself how you saw the year going: *What were my plans, my dreams, and my concrete goals—if any?* Don't focus on just one or two areas. Remember, our lives consist of ten interrelated domains. It's important to get clear on what you wanted to happen across all or at least most of them.

### STEP 2 ACKNOWLEDGE WHAT ACTUALLY HAPPENED.

Take an honest look at the past year and examine where things went right and where they went wrong. There may be distance between your desire and your current reality. Some of your goals, perhaps many of them, remain unfulfilled. So ask yourself: *What disappointments or regrets did I experience this past year?*

When we review the past, it's easy to interpret some of the feelings that come up as regret. Because these memories can be painful, it's tempting to dismiss or ignore them. But you don't want to leave these things hanging in the air or push them behind you like they don't matter. Both will prevent you from taking meaningful action in the present. Another question to ask yourself is: *What did I feel I should have been acknowledged for but wasn't?* There's real emotional power in simply admitting what we wished others would have noticed and commended in our actions but didn't.



Believe it or not, regret can be a good thing. Some people are usually a little stunned to hear this. We're not minimizing the pain of regret. The pain can be real and intense, and it's a natural part of feeling regret. But pain only becomes a problem when we rush to distance ourselves from it too quickly. Too often, we'd rather not live with the feeling long enough to gain the benefits. And that's a big mistake.

University of Michigan psychologist Janet Landman suggests there are several benefits to regret, including:

**INSTRUCTION.** *Regret is a form of information, and reflecting on our missteps is critical to avoiding those missteps in the future.*

**MOTIVATION TO CHANGE.** *Landman says, "Regret may not only tell us that something is wrong, but it can also move us to do something about it."*

**INTEGRITY.** *Regret works like a moral compass, signaling when we've veered from the path and showing us how to get back on track.*

Curiously, regret also exposes opportunities. What does that mean? Several years ago, Neal Roese and Amy Summerville, a pair of researchers from the University of Illinois, studied people's biggest regrets in life. The six biggest regrets people expressed had to do with education, career, romance, parenting, self-improvement, and leisure. Roese and Summerville found that "feelings of dissatisfaction and disappointment are strongest where the chances for corrective reaction are clearest." In other words, regrets don't just flow backward like a blocked sewer pipe, oozing bad past experiences. They also point forward to new and hopeful possibilities. Roese and Summerville called their discovery the Opportunity Principle, and it's almost 180 degrees from our typical assumptions.

According to the Opportunity Principle, we tend to feel regret the strongest when the opportunity for improvement is greatest. No one does well under a crushing burden of

regret. Thankfully, our minds have natural processes for dealing with pressure, especially when there's little chance to fix a situation. It's where we get folk wisdom like "time heals all wounds." But the research shows that sometimes regret dogs our heels precisely because there's a chance to improve our situation, whether that's going back to school, changing careers, or repairing relationships. It turns out regret is a powerful indicator of future opportunity. As Roese says, "It shows the value of experiencing regret deeply,

*Regret is a powerful indicator of future opportunity.*

Don't let mistakes become distractions.

CARLA HARRIS

listening to what these emotions tell you, what they reveal about your deepest wishes, then acting quickly on these newfound insights."

When you look back and acknowledge what actually happened, you'll probably discover some common recurring themes. Make a note of these so you can distill learning objectives from them to serve as tools for navigating into the future—which takes us to the third step.

### STEP 3 LEARN FROM THE EXPERIENCE.

*What were the major life lessons you learned this past year?* Unless we learn from our experiences, we can't grow. If you have trouble identifying your key lessons from the year, one way to suss them out is to ask: *What was missing from my success?* Maybe it was strategic planning—you wish you had done more of that in your business. Maybe you wish you had saved more money, spent more time with your spouse, played more with your kids, taken a sabbatical, or read more books. Another good question to ask is: *Did I have any limiting beliefs that blocked my progress or got me off track?* At this point, you're prepared to address those. Answering these questions is an effective way to learn what went wrong and what it would take for things to go right in the future.

To retain these lessons, you'll want to distill your discoveries into short, memorable statements. This transforms your takeaways into accessible wisdom sayings to guide your path into the future. Here's an example: "Don't overthink the outcome; just do the next right thing." Or, "I can do anything I want. I just can't do everything I want." You get the idea. Distill the lessons from your experiences so you don't lose them and so they can serve as tools moving forward.

### STEP 4 ADJUST YOUR BEHAVIOR.

This is where a lot of people go wrong. Why? They don't follow through and change what needs to be changed. If something in your beliefs and behaviors contributed to the gap between what you wanted to happen and what actually happened, something has to change. In fact, that gap will only widen and worsen unless you pivot.

It's not enough to acknowledge the gap. It's not even enough to learn from the experience. If you don't change your beliefs and how you act on them, you'll actually end up in a worse spot than when you started. Thinking backward can help us learn from the past and discern positive behaviors to apply toward building a better future.

COLIN POWELL

## The Gratitude Advantage

There's one more component of completing the past: gratitude. Gratitude is a vital catalyst to creating your best year ever. According to a study of 383 high school students published by Cambridge University Press, gratitude is associated with higher levels of academic achievement and autonomous motivation. Before this, theorists assumed that gratitude might make people complacent—less likely to strive toward their goals. The idea is that, if you're grateful, you're content, and therefore don't feel the need to strive. But the research shows that, instead of making people complacent, gratitude enhances goal-striving. There are several reasons for this, and they all have to do with resilience—the ability to push through difficulties and overcome obstacles. We call these combined reasons the Gratitude Advantage.

Gratitude keeps us hopeful. Let's say our circumstances look a certain way, but then something happens to improve them. Gratitude happens when we take notice of the distance between those two points. Suddenly, we have something to be thankful for. Gratitude also reminds us we have agency. We have the power to act and effect change in our lives. This might seem counterintuitive, since gratitude involves giving thanks for what others have done for us. But that's an illusion. If we didn't use our agency to receive and act on what others have done for us, we wouldn't have benefited. On top of that, gratitude improves our patience. A lot of times we take the easy way out because we're impatient. Achieving big goals takes time and effort. We're apt to cut corners or bail when we face difficulties. Thankfully, gratitude can keep us in the game by helping us notice the progress we are making.

Finally, gratitude expands the scope of possible responses. It moves us into a place of abundance. As we've already seen, this is a place where we're more resourceful, creative, generous, optimistic, and kind. When we're operating from a place of scarcity, we're more likely to be reactionary, closed-minded, tightfisted, gloomy, and even mean. No matter how crazy this past year has been, we all can point to blessings, benefits, gifts, and assets in our lives. Yes, there are a million things we don't have, but there are a million things we do. Whatever our past, if we can see it through the lens of gratitude, we will discover that our present is more than all we could possibly ask or imagine.

Sometimes the problem is that gratitude can be hard to muster. Even when things are going okay, it's easy to get so accustomed to our lives that we miss what's wonderful about them. One solution is something psychologist Timothy Wilson calls the "George Bailey technique." In the film *It's a Wonderful Life*, George Bailey believes the world doesn't really need him. But then the angel Clarence shows him an alternate world in which he doesn't exist, and Bailey realizes that he does, in fact, make the world a better place.

WANDA WALLACE

The George Bailey technique takes this idea and asks people to subtract this or that good thing or experience from their lives. Imagine not having your job, your home, your kids, whatever. According to Wilson, people who imagined the absence of something good reported feeling a renewed sense of wonder and affection for it. The great news is that we don't have to wait until something is actually gone to recognize its value. By using our imaginations we can see what the people and opportunities we have mean to us.

Gratitude allows us to appreciate what we have in the here and now. It provides the advantage of helping us make the most of this life we've been given. This may be challenging if you've experienced some extraordinary setbacks or losses in the past.

But it's during these times that gratitude is the most important skill to practice. It's the key to overcoming those challenges.

*Treat regret like a road sign,  
not a roadblock.*

To summarize, we need to complete the past before we build for the future. One effective way to do that is working through the four steps of the After Action Review. It's critically important to acknowledge the gap between what we wanted to happen and what actually took place. It's also critical for us to recognize that some of our greatest disappointments may lead us to our greatest opportunities for the new year. Treat regret like a road sign, not a roadblock. And look for ways to express gratitude about the past and the present. It'll help us as we turn our eyes forward to design a stronger future.

## ROADBLOCK



HINDERS  
PROGRESS

VS

## ROAD SIGN



SHOWS NEW  
OPPORTUNITY



Before we jump to the next lesson, turn to **EXERCISE 3** on page 48. It's time to do an After Action Review for yourself.

SØREN KIERKEGAARD

## BONUS 3

## Using the Gratitude Advantage at Work

Lona Collins was 107 years old. When a reporter asked what she does to stay young, she said gratitude. "Don't go crabbin'," she advised.

Research shows that expressing thanks leads to lower stress, better relationships, improved health, and more. But there's one place we're less likely to express gratitude—work.

Lack of gratitude is more common than you might think. In fact, a study by the John Templeton Foundation found that work is the last place we experience any sort of gratitude. The place we need gratitude the most is where we usually experience it the least.

This is a big problem. Practically speaking, most of us spend more waking time at the office than anywhere else. That means if we expect to use the Gratitude Advantage to our benefit, work is actually the best place to do it.

It may be an uphill climb, but these six tactics can help you power your success by expressing thanks:

- 1 **RECOGNIZE THE VALUE.** About half of HR managers say that workplace gratitude improves profitability. The truth is the number is probably a lot higher, and the reason is simple. As Jeremy Adam Smith says, "We don't just work for money. We also work for respect, for a sense of accomplishment, for a feeling of purpose." Gratitude engages more of what motivates us.
- 2 **COMMIT TO IT.** Most of us know we should express thanks, but the Templeton study found only about one in ten of us actually does on any given day. In fact, about a third are afraid to do so. We need to step outside our comfort zones and commit to changing that statistic today.
- 3 **SHARE THE LOVE.** None of us can do it alone. Even solopreneurs need a team. When you experience success, look for ways to acknowledge the contributions of your friends, colleagues, clients—anyone who played a role. It doesn't make less of your success; it makes more of how you scored.

- 4 **HIGHLIGHT SPECIFICS.** The more detailed you can be, the better. "When you are specific about the benefits of a person, action, or thing," says Smith, "it increases your own appreciation—and it tells a person that you are paying attention, rather than just going through the motions."
- 5 **USE ACTIVATION TRIGGERS.** Thinking through probable scenarios and formulating your response ahead of time helps turn intention into reality. These are called Activation Triggers and they increase the likelihood we'll follow through on what we intend. We cover Activation Triggers in detail in Lesson 5, but here are some examples to get your mind going:
  - If Susan finalizes the deal today, then I will congratulate and thank her today as well as recognize her for her contribution at the next team meeting.
  - When John gets me the report, I will remember to swing by his desk and thank him in person.
  - If we hit the annual goals, then I will bring champagne to business reviews and toast the division leaders.
- 6 **LEAD FROM WHERE YOU ARE.** Experts (and employees) recognize that it's best when leaders go first. But leadership is not just position; it's also influence. That means you can start wherever you are in your organization and have an impact in your own life and your company.

People will only go so far in the performance of a duty. And they will underperform when they feel underappreciated. Gratitude is the most effective currency for helping people perform at their best.

If you want people's very best, you have to have their hearts. You can't demand this or even buy it with a paycheck. Gratitude is the most effective currency for keeping people engaged and performing at their best. That's true for you and the people you lead.

EXERCISE 3

AFTER ACTION REVIEW

INSTRUCTIONS AND EXAMPLE

Get your pen and work through all the questions in the order they're presented. Answer each of them as honestly as you can, and write down whatever comes to mind first. Don't overthink this, and don't try to self-edit. You want this raw and unfiltered. Don't rush your answers. Take your time and really process the past, including any regrets. This is critically important, because in the next lesson we turn the corner.

As part of this exercise, make a list of ten things you're grateful for right now so you can begin to plan and spend the next three lessons in an abundance mindset.

EXERCISES

COMPLETE YOUR OWN AFTER ACTION REVIEW

To conduct your own After Action Review, work through the four steps: first, state what you wanted to happen; second, acknowledge what actually did happen; third, learn from the experience; and finally, adjust your behavior. It's effective to work through these steps by answering the six questions from the lesson.

1. What were my plans, my dreams, and my concrete goals—if any? Did you have any wins?

I thought this would be a great a year, and in large part it was. But nothing ever goes entirely according to plan.

2. What disappointments or regrets did I experience this past year?

I wanted to spend a lot of time with my family. I wanted to get promoted at work and to hire an executive assistant. We planned on taking two separate, one-week vacations as a family. I think I also expected to be able to have more control of my schedule at work so I could make some of these things happen.

3. What did I feel I should have been acknowledged for but wasn't?

I didn't gain as much autonomy as I desired at work, so we only got to take one vacation as a family over the summer. Working toward a promotion ended up requiring an extra project that I didn't expect. My work-life balance continued to be out of whack. I did get promoted, but haven't been approved for an assistant yet.

## COMPLETE YOUR OWN AFTER ACTION REVIEW

*To conduct your own After Action Review, work through the four steps: first, state what you wanted to happen; second, acknowledge what actually did happen; third, learn from the experience; and finally, adjust your behavior. It's effective to work through these steps by answering the six questions from the lesson.*

What were my plans, my dreams, and my concrete goals—if any? Did you have any wins?

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What disappointments or regrets did I experience this past year?

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What did I feel I should have been acknowledged for but wasn't?

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What were the major life lessons you learned this past year?

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What was missing from my success?

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Did I have any limiting beliefs that blocked my progress or got me off track?

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LIST TEN THINGS YOU'RE GRATEFUL FOR

*Put the Gratitude Advantage to work for you by writing down ten reasons for thankfulness in your life today. For starters, what went well in the last year?*

|    |  |
|----|--|
| 1  |  |
| 2  |  |
| 3  |  |
| 4  |  |
| 5  |  |
| 6  |  |
| 7  |  |
| 8  |  |
| 9  |  |
| 10 |  |

## LESSON 3

# DESIGN YOUR FUTURE

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Now, it's time to find clarity, so you can confidently create the life you want. In this lesson, we'll take your resolutions and aspirations and transform them into powerful, compelling, written goals using our proven seven-part framework.

You've probably heard of SMART goals. They have five different attributes, one for each letter of the SMART acronym. General Electric pioneered the approach decades ago. Based on insights from the best goal-achievement research available, we've updated and expanded the system so you can get the results you're after. There are seven attributes of the SMARTER system.



### SPECIFIC

Focus is power. You can drive the same amount of water through two pipes and create greater force in one just by reducing its diameter. That's what happens when we narrow our goals. The more specific we are, the more likely we are to engage our focus, ingenuity, and persistence. Vague goals don't inspire us. But specific goals create a channel for our creativity and effort. All it takes is identifying precisely what you want to accomplish.

For example, "Learn photography." Is that specific? No. Photography is a huge field. You've got to narrow it down. "Complete John Greengo's 'Fundamentals of Photography' course." Now that's specific.

### MEASURABLE

This is important for two reasons. First, without some sort of measurement, how can you tell whether you've accomplished your goal? It's not very helpful—or inspiring—to say you want to make more money this year than last. How much more? There's a big difference between a cost-of-living adjustment and driving up your commissions by 30 percent. By making a goal measurable, you establish the criteria for success.



Second, keeping your goals measurable helps you track your progress. A measurable goal allows you to set markers and milestones along the way. And, honestly, half the fun is in the progress we make. The only way you know you're making progress is by measuring yourself against the target. This is especially important when it comes to complex goals with several milestones, which are covered in a bonus at the end of this lesson.

### ACTIONABLE

Goals are fundamentally about what you're *going* to do. So when formulating your goals, it's important to get clear on the primary action. The easiest way to do this is to use a strong verb to describe and prompt the specific action you want to take. You don't want something like *am*, or *be*, or *have*. You want a verb like *run*, *finish*, or *eliminate*.

A couple of examples: "Be more consistent in saving." Is that actionable? No. That's a state-of-being verb. But something like "Deposit 10 percent of each paycheck into my savings account" is actionable. It starts with the verb *deposit*, and it's clear and directive about what you're supposed to do.

### RISKY

Normally we talk about setting goals that are realistic. That's what the "R" in SMART goals usually refers to. But if we start by asking what's realistic, we're likely to set the bar too low. We can accidentally trigger our natural desire to avoid loss. Then we end up accomplishing less than we might have. As Orison Swett Marden, founder of *SUCCESS* magazine, says, "All who have accomplished great things have had a great aim, have fixed their gaze on a goal which was high, one which sometimes seemed impossible." In other words, we rise to the challenge but hold back when it's easy.

| *Discomfort is a catalyst for growth.*

We all have dreams for a better future. However, our aspirations can feel too fragile and too far away. We jump ahead of ourselves and start worrying about how we're going to achieve those goals. Then, we let the *how* overshadow the *what* and downgrade our aspiration. We aim low. We settle for less. And what we expect becomes our new reality.

If we want something better, we have to recognize that discomfort is a catalyst for growth. It forces us to strive, to change, and to adapt. Goals have to stand somewhere outside your comfort zone.

Life is either a daring adventure or nothing.

HELEN KELLER

If you know exactly how to achieve your goal, it's probably not big enough. If you already have all the necessary financial and emotional resources, it's probably not challenging enough. If you want to really win, you have to go beyond your natural urge to play it safe. You have to leap outside your comfort zone and into your discomfort zone.

You've probably already experienced the benefits of jumping outside your comfort zone at some point in your life. Maybe it was learning a new skill, meeting a new person, or taking on a new challenge. Usually, we don't take the time to enjoy it in the moment. But, looking back, we have to admit that most of the best stuff in life happens outside our comfort zone. Setting SMARTER goals enables us to strategically engineer those benefits.

You may be asking, "How do you know if you're reaching far enough?" Honestly, it's when you start feeling emotions we normally consider negative—fear, uncertainty, and doubt. You'll really know you're on the right track when those are mixed up with a surge of excitement and expectation. The trick is setting goals that are appropriately challenging and not just plain crazy. There's a difference between discomfort and delusion. We can all step into the delusional zone if we're not careful. Goals in the discomfort zone challenge us and summon our best performance. Goals in the delusional zone invite defeat and merely leave us frustrated and discouraged.

How can you tell you're veering into the delusional zone? Life experience helps. So does talking with a spouse or someone close to you. Other people are usually better than we are at identifying our blind spots. The main thing is to get outside your comfort zone. That's where you'll experience the growth you want, the solutions you need, and the fulfillment you desire.

## **TIMEBOUND**

Goals need to include one or more of five different time signatures: a deadline, frequency, start date, time trigger, or streak target. It helps to break down goals into two broad categories: achievement goals and habit goals. Achievement goals are focused on one-time accomplishments. It could be paying off your credit cards, improving your personal best for a half-marathon, or finishing writing your first novel. Deadlines are essential for all achievement goals. They drive action.



"Increase sales revenue 20 percent" is almost meaningless without a deadline. It could happen any time over the next ten years. Adding a deadline creates focus: "Increase sales revenue 20 percent by the close of the second quarter." When the deadline is up, you'll know if you've achieved the goal or not.

Here's an easy opportunity to leap with some intention into your discomfort zone. It might feel better—more comfortable—to assign distant deadlines. But distant deadlines discourage action. You'll think, *I have so much time. It's not due for another ten or twelve months.*

*Short time horizons  
concentrate our effort.*

Effort dissipates as time expands. But the reverse is also true. Short time horizons concentrate our effort. The tighter the deadline, the more focused and productive you can be. A study by goal theorists Edwin Locke and Gary Latham found workers in one field experiment were able to keep production at 100 percent even when their time was cut by 40 percent. The new deadline created huge gains in productivity. And we can experience similar gains in our personal and private lives when we set near-term goals, leaving more margin for other pursuits.

It's a little different when it comes to habit goals. Instead of one-time accomplishments, habit goals involve regular, ongoing activity. Think about a daily meditation practice, a monthly coffee date with a friend, or walking each day after lunch. There's no firm deadline, because you're not trying to accomplish just one thing. You're trying to maintain a practice. But time signatures are still essential. The most effective habit goals utilize several, including:

**START DATE:** *when you intend to begin installing your new habit*

**FREQUENCY:** *how often you plan to do the action*

**TIME TRIGGERS:** *when in the day you want to do the action*

**STREAK TARGETS:** *how many times you have to do the action before you can consider the habit second nature*

To make this easy for you, there is a fill-in-the-blank template you can follow at the end of this lesson.



## EXCITING

Researchers say that we stand a better chance of reaching our goals if we are internally motivated to do so. External motivations might work for a while, but if we're not getting something intrinsic from the goal, we'll lose interest.

The problem is, most of us set goals we think are good for us. And if we're really being honest, we often set goals *other people* think are good for us—spouses, friends, bosses, and so on. The trick is to set goals that are not only personally important but also personally inspiring.

If you don't find your goals personally compelling, you won't have the motivation to push through when things get tough or tedious. This is where you've got to be honest with yourself. Ask, *Does this goal inspire me? Does it engage my heart? Am I willing to work hard to make it happen?* You might even ask if you find it fun. All of these questions get at something we'll cover in the next step—finding your why.

Remember, we're setting risky goals. We're going to be tempted to quit at some point. Only an exciting goal can access the internal motivation you need to stay the course and achieve your goal.

## RELEVANT

If we're going to succeed, we need goals that align with the legitimate demands and needs of our lives. This attribute comes at the end of the list, because it's a good way to gut-check your goals before committing to them. We can all stumble on this point if we're not careful.

Are you a working parent with young kids? Your goals will look much different than an undergrad or an empty nester. Depending on your circumstances, going to med school might not be in the cards right now. And pursuing a new weekend-gobbling hobby might put unwanted strain on your family. You need to set goals that are relevant to your actual circumstances and interests.

*Set goals that are relevant to your actual circumstances and interests.*

Forget about trying to compete with someone else. Create your own pathway.

HERBIE HANCOCK

You also need goals that align with your values. This should be obvious, but we've already seen that we sometimes bend to outside pressure and set goals that go against the core of who we are. The pressure could be social, professional, whatever. But you need to resist the temptation to gear your performance for others, especially if it somehow goes against your values. You have to set the right kind of goals that work with who you are and what you care about.

Finally, you need goals that align amongst themselves. They have to be relevant together. Setting multiple conflicting goals will only create friction and frustration. If we're working against ourselves, we'll experience more heartburn than progress. That goes for setting too many goals in general. You don't need one big, crazy leap to land in the delusional zone. Sometimes you can drift there with the accumulated demands of multiple goals. This happens when people plan major deadlines simultaneously or stack up projects one after another without enough margin. You know what happens next. It's a train wreck just waiting to happen.

Sometimes our aspirations are far bigger than our calendars. The main thing to watch here is your bandwidth. We recommend setting no more than eight goals per year. And limit yourself to just two or three per quarter. That includes both personal and professional goals. You can always add a new goal once you complete an existing one. Overloading your goal list will undermine your focus, along with your results.

So that's the SMARTER system. SMARTER goals are specific, measurable, actionable, risky, time-bound, exciting, and relevant.



And now it's time to write some SMARTER goals of your own. Turn to **EXERCISE 4** on page 72.



## BONUS 4

Significant achievements are often the result of ingrained habits over time. Consider the following examples:

## Using Habits to Achieve Your Goals

Bill and Nancy have an awesome marriage. It's not just that they were lucky and married the right person. They have intentionally cultivated intimacy. As simple as it sounds, they have gone on a date night every week for more than two decades. This habit has provided a context in which they can have meaningful conversations about the things that matter most. They also enjoy each other's company.

Spencer is in the best shape of his life. Whenever he goes in for his annual physical, his doctor is amazed. He has continued to improve for each of the last five years. The surprising thing is that Spencer just turned sixty last year. But his health is not an accident. It dramatically improved when he began to cultivate the habit of working out five days a week.

Larissa has built a seven-figure business in just three years. You might be tempted to write off her success due to the fact that she stumbled onto a great idea at exactly the right time. Certainly, that played a role. But if you asked her the secret to her success, she would chalk it up to her habit of making five sales calls every week.

In all these cases, habits are the driving force. They are an effective way to achieve your dreams, but only if you know when and how to use them.

Habits are most useful when you have a vague aspiration that you just can't seem to make measurable. For example, let's say you want to grow closer to God. You could set a habit goal like this: "Spend 20 minutes a day in Bible reading and prayer, five days a week at 6:00 a.m., beginning January 1 and continuing for 70 days." Or if you want to develop more intimacy with your spouse, you could set a habit goal like this: "Take my spouse out for dinner and an evening of conversation once per week on Friday at 6:00 p.m. beginning March 1 and continuing for 52 weeks."

Another way to use habit is as a step—perhaps the only step—in completing an achievement goal. For example, let's say you want to write a 50,000-word book by June 30. You could identify several next steps, or you could focus on simply installing a habit. For example, "Write 500 words a day, five days a week, at 6:00 a.m. beginning on February 1 and continuing for 100 days." You'll notice that the examples we've included follow the SMARTER framework. It's just as important for habit goals as it is for achievement goals.

## BONUS 5

## Managing Complex Goals

We suggest that you should have no more than eight goals for the year, with only two to three goals due per quarter. You can think of these as slots to fill. Once the slots are filled, you can't add any more.

This is important for a few reasons. Resources are limited, and most are already taken up by our day-to-day tasks. But goals require effort *in addition* to our day-to-day work. We can't afford to spread our time, energy, and attention too thin.

That said, some goals will take more than a single quarter to complete. If you're not careful, you can end up with eight goals that feel more like twenty, thirty, or more. We recommend managing large goals a little differently.

Let's start by making a distinction. We'll call goals that can be started and completed within one quarter simple goals. But if a goal takes several quarters to complete, we can think of it as a complex goal. For example, maybe you have a financial goal to pay off a large debt, an intellectual goal to read fifty-two books by the end of the year, or an avocational goal to write a book that will take six months to complete. Each of those is a complex goal.

For complex goals like these, we need to break down our activity into milestones. Using the above examples, the milestones might look like this:

- **Pay off \$1,700 toward the car at the end of each month from January through March.** That would be a quarterly milestone. The three remaining quarters would each be a milestone as well.
- **Read thirteen business books by March 31.** For the following quarters, you could repeat that milestone to reach your total of 52 books by the end of the year.
- **Finish writing chapters 1–6 of my book by June 30.** The next milestone would be to finish chapters 7–13 by September 30.

The trick here is to treat each milestone like a simple goal. So the eight-goal limit could include a combination of simple goals and milestones, but not more than three total in any given quarter. Let's map this out, so we can see it more clearly. The following chart illustrates one complex goal and four simple goals for the year. Counting the complex goal's four milestones as if they were individual simple goals, we arrive at a total of five goals, two goals per quarter.

| DEBT-FREE GOAL |                                  |    |                                  |
|----------------|----------------------------------|----|----------------------------------|
| Q1             |                                  | Q2 |                                  |
| 1              | DEBT-FREE, QUARTERLY MILESTONE 1 | 1  | DEBT-FREE, QUARTERLY MILESTONE 2 |
| 2              | SIMPLE GOAL                      | 3  | SIMPLE GOAL                      |
| Q3             |                                  | Q4 |                                  |
| 1              | DEBT-FREE, QUARTERLY MILESTONE 3 | 1  | DEBT-FREE, QUARTERLY MILESTONE 4 |
| 4              | SIMPLE GOAL                      | 5  | SIMPLE GOAL                      |

The above example would look exactly the same for the annual reading goal. But what about pursuing two complex goals for the year, each with four milestones? Since we're counting each milestone as a simple goal, this means we could have only two total goals for the year: our debt-free goal (which takes one goal slot per quarter) and our annual reading goal (which takes another goal slot per quarter). See the following chart.

| DEBT-FREE GOAL AND ANNUAL READING GOAL |                             |    |                             |
|--|-----------------------------|----|-----------------------------|
| Q1                                     |                             | Q2 |                             |
| 1                                      | DEBT-FREE, MILESTONE 1      | 1  | DEBT-FREE, MILESTONE 2      |
| 2                                      | ANNUAL READING, MILESTONE 1 | 2  | ANNUAL READING, MILESTONE 2 |
| Q3                                     |                             | Q4 |                             |
| 1                                      | DEBT-FREE, MILESTONE 3      | 1  | DEBT-FREE, MILESTONE 4      |
| 2                                      | ANNUAL READING, MILESTONE 3 | 2  | ANNUAL READING, MILESTONE 4 |

What if one of the Complex Goals takes fewer quarters than four to complete? Let's use the debt-free goal (which takes four slots) and our book-writing goal (which takes another two slots) as our scenario. In that case, we have two remaining slots for additional simple goals, adding up to a total of four goals. Here's what it would look like:

| DEBT-FREE GOAL AND BOOK WRITING GOAL |                                     |    |                                     |
|--------------------------------------|-------------------------------------|----|-------------------------------------|
| Q1                                   |                                     | Q2 |                                     |
| 1                                    | DEBT-FREE, QUARTERLY MILESTONE 1    | 1  | DEBT-FREE, QUARTERLY MILESTONE 2    |
| 2                                    | SIMPLE GOAL                         | 3  | BOOK WRITING, QUARTERLY MILESTONE 1 |
| Q3                                   |                                     | Q4 |                                     |
| 1                                    | DEBT-FREE, QUARTERLY MILESTONE 3    | 1  | DEBT-FREE, QUARTERLY MILESTONE 4    |
| 3                                    | BOOK WRITING, QUARTERLY MILESTONE 2 | 4  | SIMPLE GOAL                         |

Given the amount of resources they require (time, energy, attention, and so forth), we recommend you limit yourself to just one or two complex goals for the year. You can fudge that a bit, depending on how many quarterly milestones they require. But this goes back to the final R of the SMARTER framework: Relevant. If you set too many complex goals, you'll end up in the delusional zone, and you won't make the progress you desire. Besides, if you have more than two complex goals, you likely won't have enough slots left to address other domains of your life that require your focus and effort.

BONUS 6 SMARTER Goal-Setting Templates and Examples

ACHIEVEMENT GOAL TEMPLATE

|            |  |                 |
|------------|--|-----------------|
| Run        | the Country Music Half Marathon          | by April 21.    |
| ACTIONABLE | SPECIFIC, MEASUREABLE, RISKY, & EXCITING | TIMEBOUND       |
| RELEVANT   |  |                 |
| Read       | 50 business books                        | by December 31. |
| ACTIONABLE | SPECIFIC, MEASUREABLE, RISKY, & EXCITING | TIMEBOUND       |
| RELEVANT   |  |                 |
| Raise      | revenue by 50% by the end of fiscal year | 2021.           |
| ACTIONABLE | SPECIFIC, MEASUREABLE, RISKY, & EXCITING | TIMEBOUND       |
| RELEVANT   |  |                 |

HABIT GOAL TEMPLATE

|              |                                |                 |
|--------------|--------------------------------|-----------------|
| Walk         | 2 miles                        | M-W-F           |
| ACTIONABLE   | MEASUREABLE, RISKY, & EXCITING | HABIT FREQUENCY |
| at 6am       | starting June 1                | for 12 weeks.   |
| TIME TRIGGER | STARTING DATE                  | STREAK TARGET   |
| RELEVANT     |                                |                 |
| Practice     | guitar                         | every weeknight |
| ACTIONABLE   | MEASUREABLE, RISKY, & EXCITING | HABIT FREQUENCY |
| at 7pm       | starting September 1           | for 70 days.    |
| TIME TRIGGER | STARTING DATE                  | STREAK TARGET   |
| RELEVANT     |                                |                 |
| Drink        | 64 ounces of water             | every day       |
| ACTIONABLE   | MEASUREABLE, RISKY, & EXCITING | HABIT FREQUENCY |
|              | starting January 1             | for 70 days.    |
| TIME TRIGGER | STARTING DATE                  | STREAK TARGET   |
| RELEVANT     |                                |                 |

## SMARTER GOAL EXAMPLES BY LIFE DOMAIN

| SPIRITUAL   | INTELLECTUAL  |
|---|---|
| <ul style="list-style-type: none"> <li>• Set aside 15 minutes in the morning, 6 days a week, for reading and prayer starting January 1.</li> <li>• Meditate for 30 minutes each day, 4 days a week beginning February 1.</li> <li>• Journal at least 5 minutes at the end of each day starting January 1.</li> </ul>  | <ul style="list-style-type: none"> <li>• Read 2 books per month, starting in January.</li> <li>• Select 2 conferences to attend and register by February 15.</li> <li>• Buy a foreign language program and learn Spanish by November 1.</li> </ul>  |
| EMOTIONAL   | PHYSICAL  |
| <ul style="list-style-type: none"> <li>• Get back to gardening this spring—tomatoes, peppers, cucumbers, squash, and herbs in the ground by April 15.</li> <li>• Research and find a therapist/counselor, and start regular monthly sessions by March 1.</li> <li>• Organize and redecorate my office by February 15.</li> </ul>  | <ul style="list-style-type: none"> <li>• Replace fast-food lunch with healthy meals from home each weekday, starting June 1.</li> <li>• Run 30 minutes each day, 4 days a week at 6:30 a.m., starting March 4.</li> <li>• Choose a regular bedtime and get 8 hours of sleep per night for the next 90 days beginning January 1.</li> </ul>                                |
| RELATIONAL  | PARENTAL  |
| <ul style="list-style-type: none"> <li>• Create a date-night profile on Netflix and identify 20 movies for a weekly date beginning in May.</li> <li>• Plan 2 regular dates each month and get them on the calendar by January 15.</li> <li>• Pick 3 errands or tasks my spouse regularly does but doesn't enjoy. Do one each week for him/her beginning April 1.</li> </ul> | <ul style="list-style-type: none"> <li>• Leave the office by 5:00 p.m. to have enough time for dinner and games with the kids starting in January.</li> <li>• Have the kids brainstorm 25 meals. Cook at least 1 each weekend beginning in February.</li> <li>• Set aside 7 vacation days to spend with family at our favorite location. Schedule by March 15.</li> </ul> |

SMARTER GOAL EXAMPLES BY LIFE DOMAIN

| SOCIAL  | VOCATIONAL   |
|---|--|
| <ul style="list-style-type: none"><li>• Join an athletic club/training group to meet new people by February 1.</li><li>• Volunteer with Habitat for Humanity on a local build by July 1.</li><li>• Take a painting/wine-tasting class to meet new people by August 1.</li></ul>                                       | <ul style="list-style-type: none"><li>• Launch new product by March 30.</li><li>• Add 5,000 email subscribers to database by June 15.</li><li>• Quit job and launch new business by October 1.</li></ul>   |
| AVOCATIONAL   | FINANCIAL  |
| <ul style="list-style-type: none"><li>• Volunteer for the City Mission beginning on March 1.</li><li>• Visit 2 new restaurants each month beginning February 1. Make a list by January 30.</li><li>• Research 12 of the best action movies/comedies ever filmed and watch 1 each month beginning January 1.</li></ul> | <ul style="list-style-type: none"><li>• Pay off remainder of car loan in the amount of \$8,000 by August 25.</li><li>• Reduce eating out to 1 meal each week beginning January 1.</li><li>• Pay down \$5,000 in credit card debt by May 1.</li></ul> |

We all lie in suspense from day to day; in other words, you are the hero of your own story.

MARY MCCARTHY

EXERCISE 4

SETTING SMARTER GOALS

INSTRUCTIONS AND EXAMPLE

Have a look at your list of hopes and dreams from Exercise 1. This exercise is all about distilling those down into goals. We recommend a mix of achievement and habit goals. Also make sure you include goals from several different life domains.

Using the following Annual Goals list, write down up to eight goals for the next year using the SMARTER framework. Keep in mind your number of Complex Goals as you do this.

Once you've defined your SMARTER goals, rewrite each of them in the Goal Summary sections at the top of the Goal Detail pages beginning on page 109.

| ✓ | # | GOAL STATEMENT / Write your annual goals here.  | Q* |
|---|---|---|----|
|   |   | Develop the habit of reading a passage from my C.S. Lewis devotional every morning at 5 am, starting January 1 for 90 days. | Q1 |
|   |   | Read 30 business books by December 31.  | Q4 |
|   |   | Develop a twice-daily meditation habit starting April 1 and for the next 90 days.   | Q2 |
|   |   | Run the Rock 'n' Roll Half Marathon in Nashville on April 21.   | Q2 |
|   |   | Begin regular date night habit every Thursday at 6 pm starting January 1 and continuing for through March 31.               | Q1 |
|   |   | Take a two-week family vacation to the Outer Banks, North Carolina by September 30.   | Q3 |
|   |   | Make 5 calls to qualified recruits every weekday at 9:30 am starting July 1 for 13 weeks.                                   | Q2 |
|   |   | Close in sunroom with new windows by November 1.  | Q4 |
|   |   | Increase savings from \$6,000 to \$30,000 for a down payment on a house by December 31.                                     | Q4 |
|   |   |   |    |
|   |   |   |    |
|   |   |   |    |
|   |   |   |    |
|   |   |   |    |



## LESSON 4

# *FIND YOUR WHY*

---

Have you ever struggled with doubt on the path to goal achievement? That's the moment when resistance hits hard and the way forward seems unclear. Truth is, this happens to all of us. We start off full of energy and excitement. But eventually we hit the messy middle. The road ahead feels longer than we assumed. There are too many competing demands. Our resources are stretched too thin. We wonder if we're going to make it to the finish line.

Encountering the messy middle is a natural part of moving toward anything you truly care about. It's tempting to think that, with the right amount of planning, we can avoid the obstacles and breeze through to the finish. But that almost never happens. Life is unpredictable. Something unexpected is bound to happen. How do we keep going in these moments? How can we find the drive to finish when resistance threatens to knock us down?

There are three primary actions you can take to overcome the messy middle.

---

### STEP 1

#### IDENTIFY YOUR KEY MOTIVATIONS.

---

No one crosses the messy middle to reach their goals unless they really want what's on the other side of that discomfort. Think about parenting, or getting fit, or hitting a major professional goal. All these challenges test our perseverance. This means we have to connect with what researchers sometimes call our "autonomous motives." These are the motives we find deeply and personally compelling. The reason we're doing this in the first place. Our why. These drivers come from our hopes, our values, our ambitions. They are intrinsic.



External motivation, on the other hand, comes from outside influences like society, our friends, our bosses, and so on. As we discussed in Lesson 3, external motivations are rarely as long-lasting or effective as intrinsic motivations. If you want to go the distance, you've got to find a powerful, personal reason.

*If you want to go the distance, you've got to find a powerful, personal reason.*

So what are the personal whys attached to your goals? Once you have them in mind, list as many motivations as easily come to mind. Then, distill your list down to your top three. You may have plenty more motivations, but having three crystal-clear reasons for pursuing each individual goal will make your why more compelling and memorable.

## STEP 2

### INTERNALIZE YOUR KEY MOTIVATIONS.

---

One reason New Year's Resolutions fail is that we don't truly value the things we say we do. So when things get tough, we quit. This is why it's so important to internalize your key motivations. You can do this in two ways.

First, connect to the goal intellectually. It's important to have intellectual buy-in to the motivation. This might be sparked by some research you've done or an argument you find compelling. This gets you logically committed to the goal.

Second, you must connect emotionally. Anticipate what it would feel like to achieve that goal. And, conversely, allow yourself to feel what it would be like if you missed that goal. Emotions are powerful motivators.

As you identify your key motivations, you might realize that a certain goal has immense personal value for you. Value has a lot of influence. If you value something enough, you'll find a way to make it work.

*If you value something enough, you'll find a way to make it work.*

You'll be able to endure way more than you thought you could. The opposite is also feasible. You might realize you valued a particular goal in theory, but in reality, you just don't have a deep enough motivation to pursue it any longer. And that's okay! Letting go makes space for something else that holds more value and meaning for you. The point here is to know where you stand both intellectually and emotionally in relation to a goal.

What you love is a sign from your higher self of what you are to do.

SANAYA ROMAN

Here's why internalizing your motivations is important. We can so thoroughly internalize our motivations that the actions they inspire become part of our very identity. As Florida State University psychologist Anders Ericsson and science writer Robert Pool explain, "Studies of expert performers tell us that once you have practiced for a while and can see the results, the skill itself can become part of your motivation. You take pride in what you do, you get pleasure from your friends' compliments, and your sense of identity changes." The activity is so ingrained it becomes its own reward. Maintaining the activity, they say, begins to "feel more like an investment than an expense." If we internalize our activities, that's another way of saying we fully value them, which is why we have the motivation to keep going.

### STEP 3

#### INCLUDE OTHERS.

---

The myth of the self-made person is pervasive in our culture. Our society celebrates self-control, independence, and self-reliance. These are all fine things, but the real key to success is communal dependence. It can be tempting to isolate and overwork, especially when we're struggling. Sometimes, asking for help is the harder thing to do, because it means you have to be willing to relinquish control. But let's be honest: there's no such thing as the self-made person. Success requires help, and usually lots of it.

Who we surround ourselves with matters. So rather than struggling alone to achieve a goal, we can create select communities that help everyone involved achieve their goals together. The right peers serve as a support structure for our liberating truths. They help us retain our beliefs and commitment when we hit the messy middle. If you surround yourself with scarcity thinkers, you'll struggle to stay motivated in pursuit of your goals. If, on the other hand, you surround yourself with abundance thinkers, you'll gain access to encouragement, emotional and material support, solutions, insights, and more.



There's no pride in doing things easy. No one brags about walking up the little grassy slope.

PENN JILLETTE

Surrounding yourself with people who support and encourage you is vital to getting through the messy middle. In fact, having friends who understand your goals and want to see you meet them can actually boost your level of self-control. That's the power of accountability. You're not alone, so you feel emboldened and empowered to do the right thing that keeps you on the path to your goals.

This can also come from peers who provide a healthy sense of competition. When you're regularly interacting with others pursuing a similar goal, you can find renewed drive to keep going as you see them doing the same and reaching new levels.

Supportive peer groups can take different shapes and configurations, depending on how intimate you desire them to be. Online communities, such as our private Facebook group for Full Focus Planner users, are full of people who use this goal-achievement process. Masterminds and other peer-to-peer coaching groups can reveal best practices, provide feedback, and give guidance from others who have faced the same challenges you're facing. Coaching circles provide a mentor who shares from his or her experience to counsel, inspire, and challenge. And accountability groups consist of members who are invited to speak into each other's lives, usually around a predefined set of struggles, to encourage and challenge when needed.

Bottom line: Intentional relationships make us more productive, creative, and useful than we could ever be on our own. They are vital if you hope to experience your best year ever.

*Intentional relationships make us more productive, creative, and useful than we could ever be on our own.*

When progress seems impossible, unleash the power of your why by taking three actions: first, identify your key motivations; second, internalize your key motivations; and third, include others. We all get to this middle place at some point along the way. Don't let yourself get stuck or detoured when you find yourself here. Instead, tap into your why and discover the drive you need to get to the other side.



Now it's time to turn to **EXERCISE 5** on page 84 and define your own why.

I have learned over the years that when one's mind is made up, this diminishes fear.

## ROSA PARKS

## BONUS 7

## An Action Plan for the Overwhelmed

We seem to have a busy problem. Have you noticed when you ask someone how they're doing you'll hear things like "I'm really tired" or "I'm *super* busy"? That's become something like a badge of honor.

While it's not a bad thing to feel overwhelmed, it's unhealthy to remain there. If your default setting has become "crazy busy," here are three actions you can take to get free from the overwhelm.

## ACTION 1

### FOCUS ON YOUR HIGHEST-LEVERAGE WORK.

The secret to ending the overwhelm is to do less, not more. Sometimes when we feel overwhelmed we roll up our sleeves, redouble our effort, and try to power through it. That never works, or not for long. The solution is to do fewer things that have greater impact. We get overwhelmed because we're trying to do too much with our limited resources, time, and—this is a key thing—emotional energy.

So to gain control, you have to get back to the basics. The first is to get clarity on where your best leverage is. What do you do best? What can be done only by you? To answer those questions, begin with a brain dump. Technology is probably contributing to your overwhelm, so it's important to use an analog tool for this exercise. It's important to externalize it because as long as it's in your head, it's bigger and scarier than it really is. Get in a room with a big pad of paper or whiteboard and write down everything that is overwhelming you, both personally and professionally.

Then, let that person who you've invited into the process speak into what you might not need to be doing. Someone that you trust and who knows you well can help you sort through what is actually essential and what isn't.

## ACTION 2

### IDENTIFY YOUR THREE BIGGEST PRODUCTIVITY SINKHOLES.

Your productivity sinkholes are the things that consume maximum resources and produce minimum results. Usually they're also things you dread and, therefore, procrastinate. That only adds to your sense of overwhelm.

Once you've identified them, look for ways to eliminate, automate, or delegate them. (See the book *Free to Focus* for more help in doing that.) Get rid of these drains on your time, and you'll feel like you can breathe again.

### ACTION 3

#### **SCHEDULE YOUR MOST IMPORTANT TASKS.**

In many organizational environments, the workday is reserved for meetings. That means people must do their "real work" in the evenings or on weekends. No wonder they're overwhelmed. One way to break that cycle is to schedule your tasks, not just your appointments. Remember, what gets scheduled gets done.

When you have scheduled a task, you've built a firewall against interruption. When somebody asks you for that time, you can simply say, "I'm sorry. I have another commitment. Could we try for another time?" You don't have to go into detail about what that commitment is. People understand when you say you have another commitment, your time is spoken for. They will respect that.

So respect your own calendar and respect yourself enough to make the commitment to get your work done at work. That'll restore your margin and break you out of "crazy busy" mode.

You can end the overwhelm by doing less instead of more. To do that, take three simple actions. Focus on your highest-leverage work, identify your three productivity sinkholes, and schedule your most important tasks. You'll be amazed at the results.

EXERCISE 5

DEFINING YOUR WHY

INSTRUCTIONS AND EXAMPLE

First, for each of your goals, write down several motivations on the following pages. Ask yourself, *Why is this goal important to me personally? What's at stake both positively and negatively?*

Second, go back through and identify your top three motivations for each goal and list them in the Key Motivations sections of the Goal Detail pages beginning on page 109. You can also use those same pages to add a reward for when you complete your goal, if you find that motivating.

Third, think of a few individuals or groups you could work with to complete your goals, or who can provide a healthy sense of competition, and list them on the following pages.

| GOAL 1 MOTIVATIONS  | PEOPLE               |
|---|----------------------|
| Running is how I destress and help manage my anxiety.   | Church running group |
| If I don't run, I tend to get overwhelmed easily.   | Friend Jamie         |
| Running keeps my blood pressure under control.  | My family            |
| Running gives me more energy and helps me sleep better.   |                      |
| Running is a great way to show up for my family.  |                      |
| GOAL 2 MOTIVATIONS  | PEOPLE               |
| Finishing by September allows me time to review and edit.   | Writing group        |
| I really want to get my message out into the world.   | Colleague            |
| Publishing a book will give me some credibility and serve as a good lead source for my business. I love to write. | Editor               |
| This habit will give me time to myself every morning.   | Friend Sam           |
| GOAL 3 MOTIVATIONS  | PEOPLE               |
|   |                      |
|   |                      |
|   |                      |
|   |                      |
| GOAL 4 MOTIVATIONS  | PEOPLE               |
|   |                      |
|   |                      |
|   |                      |
|   |                      |

**GOAL 1 MOTIVATIONS**

**PEOPLE**

|  |  |
|--|--|
|  |  |
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|  |  |

**GOAL 2 MOTIVATIONS**

**PEOPLE**

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|--|--|
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|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**GOAL 3 MOTIVATIONS**

**PEOPLE**

|  |  |
|--|--|
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|  |  |
|  |  |
|  |  |

**GOAL 4 MOTIVATIONS**

**PEOPLE**

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|--|--|
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|  |  |
|  |  |

GOAL 5 MOTIVATIONS

PEOPLE

|       |       |
|-------|-------|
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |

GOAL 6 MOTIVATIONS

PEOPLE

|       |       |
|-------|-------|
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |

GOAL 7 MOTIVATIONS

PEOPLE

|       |       |
|-------|-------|
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |

GOAL 8 MOTIVATIONS

PEOPLE

|       |       |
|-------|-------|
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |
| <hr/> | <hr/> |



## LESSON 5

# MAKE IT HAPPEN

---

So far you've learned four important skills. You know how to:

- upgrade your beliefs by embracing liberating truths;
- complete the past and cultivate the abundance mindset necessary to prevail;
- design a compelling future using SMARTER goals; and
- tap into the power of your intrinsic motivations to make it through the messy middle.

Now it's time for action. We're going to dive into three actions that will activate your success in goal achievement. These time-tested steps will launch you into your best year ever!

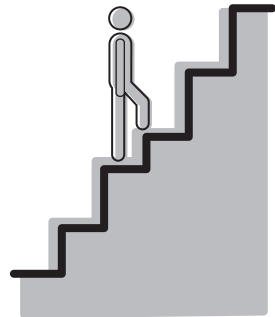
These actions are so critical for your success that we've baked them into our bestselling Full Focus Planner. We recommend you pick up your own copy to start getting some traction, and to help you stay on track to achieve your goals long after this course. For now, though, your coursebook has everything you need to get started.

### ACTION 1

#### TAKE THE STAIRS.

---

Did you know the Empire State Building is over twelve hundred feet tall? Stand on the sidewalk and look up. It's a quarter mile to the top. But did you know that you can take the stairs all the way there? There are 1,576 steps in all. And runners compete every year to see who can get up there first. If you're quick, you can do it in ten or twelve minutes. Unless you're Superman, no one can make it to the top of a skyscraper in one leap. But you can get there by taking one step at a time. And it's the same with goals.



The way you live your days is the way you live your life.

ANNIE DILLARD

In Lesson 3, we talked about setting big goals, risky goals, goals that are in our discomfort zones. There's no way we can achieve them in one jump. But all of us can break down our big goals into manageable steps. Focus on just two to three goals per quarter. Then you can break those down further into weekly objectives. These are smaller components of the larger goal.

Let's say the goal is writing a book. A weekly objective might be to outline the book, or write a sample chapter. We call these smaller objectives the Weekly Big 3. Your Weekly Big 3 might also include some actions you need to take on important projects not on your goal list. But every week, set at least one or two goal-related objectives.

Next, create daily tasks based on your Weekly Big 3. Again, we recommend no more than three daily tasks. We call them the Daily Big 3. Long to-do lists are overwhelming and discouraging. But having your Big 3 keeps your day and week in focus. Any goal is manageable one task at a time. And even if nothing else gets done, completing your Weekly and Daily Big 3 will help you make progress on your goals and projects.

Think about the Daily Big 3 like individual steps, and the Weekly Big 3 like the flights of stairs that connect one floor to the next. It might take a while, but you can make it all the way to the top if you go one step and floor at a time.

Here's another benefit of the Daily Big 3: it prevents procrastination. The first step on any goal or project is usually the toughest. But when you start with something easy, like a single task you can complete in a day, maybe in just a few minutes, you lower the threshold for action. It gives you a sense of progress. And making progress boosts your mood and makes it easier to build momentum.

Another benefit of taking it one step at a time is that it keeps your goals visible all year long. One of the main challenges we face with reaching our goals is losing track of them. It's not hard to do. Life comes at us with a million demands and distractions. Our goals slip out of view. Suddenly we're months into the year—or maybe already done with it—before we realize we're not making progress. By regularly looking for next steps, we're keeping our goals top-of-mind all year long.

**QUARTERLY GOALS**



**WEEKLY BIG 3**



**DAILY BIG 3**

Dreams and reality are opposites. Action synthesizes them.

ASSATA SHAKUR

We recommend reading through your list of annual goals once a day. With just eight goals, it should only take a minute. Some people do it as part of their morning or workday startup rituals, or when they journal. This review is super simple. As you scan the list, look for obvious next steps. Ask yourself, *What could I do today to climb closer to the top of the skyscraper—toward my goal?* Look for simple actions that connect your annual goal list to your daily task list. Make it something concrete you can easily do. Set the bar so low you can fall over it. The next day, take another step. That's how you get to the top of goal achievement: one step at a time.

## ACTION 2

### PROGRAM YOUR AUTOPILOT.

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Pursuing goals takes mental energy. You're solving problems, evaluating options, making decisions. Honestly, it can be draining. And if you're doing this when you're already tired or weary—or just distracted—you're likely to lose momentum on your goal. You might even quit the effort. The win is in making our efforts self-sustaining, so we're not thinking about them all the time. You can do that by leveraging habits and rituals.

Habits and rituals allow us to automate regular behaviors without taxing our mental energy in the process. The thinking is already done—so we're more likely to take action and follow through with our intentions.

*It's better to set your intention once and let habits and rituals sustain the activity.*

It's better to set your intention once and let habits and rituals sustain the activity. For example, say you want to develop more intimacy with your spouse. You could set a habit goal to take your spouse out for dinner once per week, on Friday nights at 6:00 p.m., beginning March 1 and continuing for fifty-two weeks. Or, say you've set an achievement goal to write a 50,000-word book by June 30. You could create a habit of writing 500 words a day, five days a week at 6 a.m., beginning on February 1 and continuing for 100 days.

State the habit goal or habit step using the SMARTER framework, so you have a clear plan for action. Then, schedule those actions. Add those goals and steps to your calendar. If you're a Full Focus Planner user, you can use the Daily Rituals and Ideal Week pages for that. What gets scheduled gets done. Once you've installed the habit, your goal achievement will be on autopilot.

Change means movement. Movement means friction.

SAUL ALINSKY

What happens if you've set a habit goal and you're having trouble maintaining it? This is where Activation Triggers can be a game-changer. Activation Triggers are simple actions or statements that streamline the process of reaching our goals. How? By anticipating whatever contingencies or obstacles we might face, we can cue our desired response. Instead of relying on our decision-making when our mental and emotional resources might be at their lowest, Activation Triggers lock in our decisions in advance—usually when our intention and resolve are at their peak. For example, laying out your gym clothes the night before makes getting ready for the gym the next morning easy to do on autopilot.

According to more than two hundred studies with thousands of total participants, people who use this method are about three times as likely to achieve their goals than those who skip this step. The trick is to leverage your best thinking once towards the beginning so you can repeat positive actions over and over again.

#### ACTION 3

#### ADJUST AS YOU GO.

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Did you know rockets are only on target when they take off and when they land? At all points in between, the navigational systems are making countless adjustments to ensure the rocket stays on course.

Goal achievement isn't exactly rocket science. But we, too, have to make constant course adjustments. Life is unpredictable. If you have no way of responding to changes in your life, work, or circumstances, a goal that began on course will likely get pulled off track. Here's how to make course adjustments in your goals.

*If you have no way of responding to changes in your life, work, or circumstances, a goal that began on course will likely get pulled off track.*

A technique called the Weekly Preview is the compass you'll use to ensure you arrive at your goal. It follows the same basic outline as the After Action Review we learned in Lesson 2. It's essentially an After Action Review for a single week, along with a look ahead at the week to come. That includes selecting your Weekly Big 3.

Don't sit down and wait for the opportunities to come. Get up and make them.

MADAM C. J. WALKER

You can use the Weekly Preview template at the back of this coursebook. We've provided a few weeks' worth there. After that, you can use the Full Focus Planner to keep your momentum going.

Start by listing some wins. Ask yourself what went well during the week, so you're working from a place of abundance and gratitude. Then, you want to look back at your Weekly Big 3. How did you perform against those objectives? Since we're talking about taking the stairs, how many did you make? Give yourself partial credit. If your objective was to call ten prospects and you only called eight, don't get down on yourself. You got 80 percent of the way there.

Next, evaluate your progress. Assess what's going well, where you can improve, and how you can keep pointed in the right direction. You want to think through what worked and what didn't. What should you do differently in the coming week? How will you adjust your behavior going forward?

*If you find that you're not making progress on a goal, it's okay to pivot.*

Maybe you did what so many people do and fell into the Planning Fallacy. You underestimated how long it would take to finish an important task on your list. And now you're off track for the month. How can you adjust your plan to account for a more realistic timeline? Or, what can you move around on your calendar this week to give yourself space to get back on schedule?

Now it's time to look forward. Review your goals again. Not just the summary statements. Also, review your key motivations. This is all about keeping your why in mind. In the busyness of life, it's easy to lose our why—and also lose our way. But when we're reviewing our key motivations week in and week out, the reasons become so internalized that we never lose sight of what's at stake. Along with that goal review, you also want to get a sense of what needs to be accomplished for the upcoming week.

And this brings us full circle with Action 1, take the stairs. Look at your goals and determine your next steps. Now you've got your next Weekly Big 3, and you're one flight of stairs closer to the top of the building.



You can do the Weekly Preview at the end of the week or the start of the next. It takes as little as fifteen minutes or as much as thirty or forty, depending on how much time you have or how thorough you want to be.

The Weekly Preview helps you adjust your course week by week. You can make larger course adjustments by doing a Quarterly Preview. It follows the same basic framework as the Weekly Preview, but it looks back at the last quarter and ahead to the next three months.

If you find that you're not making progress on a goal, it's okay to pivot. Strategies aren't sacred, and they're not set in stone. Being open to different approaches will allow you to see alternative paths to success. If you continue to struggle, remember your achievement communities. You might also consider getting a coach. There's no reason you have to walk this journey alone. Companionship can provide the extra boost you need to keep moving toward your goals.

To summarize, here are the three actions that will activate your goal achievement. First, take the stairs; break big goals down into manageable steps. Second, program your autopilot; use habits and rituals to drive achievement. Third, adjust as you go; use the Weekly and Quarterly Preview processes to stay on target all year long. Following through with these three actions will not only help you start building momentum but also propel you across the finish line with confidence and gusto.

If you've done all the coursebook exercises so far, you are well on your way to having your best year ever.



Now, turn to page 108 for one more exercise,  
**EXERCISE 6.**

We're hoping to succeed; we're okay with failure. We just don't want to land in between.

DAVID CHANG

## BONUS 8

## Activation

### Triggers

To get moving on your goals, you can use what social psychologists call *implementation intentions*. These are like situational roadmaps for progressing toward your goal. Goal intentions simply state what you intend to do.

Implementation intentions, what we call Activation Triggers, take it further by exploring the when, the where, and the how behind your goal striving. They identify goal-directed reactions to situational stimuli.

These "triggers" are structured as if/then (or, when/then) statements. For example, "If situation Y occurs, then I will perform action Z." Or, "When I encounter situation Y, I will respond with goal-directed behavior Z." This could look like the following: *"If I get hungry before mealtime, then I will eat some almonds."* Or, *"When I am all finished with lunch, then I will take a 15-minute walk around the block."*

Psychology professor Peter Gollwitzer shares that making if/then plans is a "simple self-regulation strategy" that helps individuals more readily identify "a goal-relevant situational cue." Having identified the cue, it then becomes easier to link it with "an instrumental goal-directed response." Gollwitzer writes, "While goal intentions merely specify a desired future behavior or outcome, the if-component of an implementation intention specifies when and where one wants to act on this goal . . . and the then-component of the implementation intention specifies the response that is to be initiated."

Other social psychologists agree. Researching how implementation intentions affect goal attainment, researchers Thomas Llewelyn Webb and Paschal Sheeran made the following observation of their test groups: "Unlike participants who have only formed goal intentions, participants who have formed implementation intentions have specified in advance a good opportunity to further their goal pursuit, and forged a link between this situation and the intended response. By doing so, the need to consciously deliberate over a suitable course of action in situ is removed—the intended action can be executed with less effort and in a relatively automatic fashion."

What this tells us is that simply stating a goal is not enough. You have to think through applicable situations that would elicit a goal-oriented response and then plan for them so you're ready to act on a moment's notice.

You can use Activation Triggers to reach your goals by following these four simple steps.

**STEP 1 BRAINSTORM THE BEST TRIGGERS.** When you've got a goal that meets the SMARTER standard, you want to identify the triggers that will work best for reaching the goal. Activation Triggers should be easier to achieve than your actual goals. That's the whole point. You're leveraging the easy to do the hard. After you've come up with a shortlist of two or three possible triggers, select the one you think will set you up for success. For example:

- Program the lights in your office to turn off automatically at 6:00 pm.
- Hire a fitness trainer to work on strength training.
- Set up an automatic deposit to your savings account.

Hopefully these prime the pump. Your triggers will almost certainly look very different from mine. The important thing is to identify them and build them into your life.

**STEP 2 OPTIMIZE YOUR ACTIVATION TRIGGERS.** A major part of the Activation Trigger process is thinking when you're at your strongest rather than relying on your willpower when you're not. With that in mind, you can optimize your triggers to further promote success. By taking the trigger out of your control, you're no longer relying on yourself in the moment. You're identifying contingencies—such as the desire to work late or forgetting to put money in a savings account—and taking care of them in advance. When the contingency arises, you've already handled it.

**STEP 3 ANTICIPATE OBSTACLES AND DETERMINE YOUR RESPONSE.** Even with a set of Activation Triggers firmly in place, you can still get derailed unless you identify potential obstacles and detail how you will deal with them. For example, you may have a habit goal of leaving the office promptly at 6:00 pm. But that goal can easily be undermined by a phone call or someone dropping by at the last minute. The key is to decide in advance how you will handle each of these contingencies. Here's an example. If you get a phone call after 5:45 pm,

then let it go to voicemail. If you must attend a meeting at 5:00 pm, then tell the organizer you must leave the meeting by 5:55 pm. When an important email arrives, answer it before 5:30 and don't check email again after 5:45 pm. This kind of if/then planning replaces an in-the-moment decision with a predetermined cue. The heavy lifting is already done.

**STEP 4 EXPERIMENT UNTIL YOU NAIL IT.** This is the key to success. You're going to experience setbacks. When you hit a wall, it's time to pivot. Your goal might be sacred, but your strategy isn't. Don't give up on your goal, just change your approach. That means modifying your Activation Triggers until they're working right for you. Sometimes all it takes is a small tweak. Whatever your goal, the trick is to simply think through the contingencies and obstacles that will prevent you from achieving it. Once you've thought through the most likely hang-ups, you can pre-respond so you know what to do the second they occur.

What goal-relevant situations and responses can you brainstorm for your goals? Take some time to deliberate the when, the where, and the how behind your goal striving. Do this by first picking a goal and coming up with some triggers that would elicit goal-oriented behavior on your part. Next, think through potential obstacles and contingencies you might encounter on the path to goal-fulfillment. Finally, write down if/then statements of your own and start practicing and experimenting with them until you nail it!

## BONUS 9

## Making Habits Stick

While it's often assumed that it only takes 21 days for a behavior to become a habit, continued research into the matter has shown that on average it takes more like 66 days for a habit to be instilled. Researchers project there are some habits that might even take 250 days!

Habit formation can be demanding. Here are six tricks for helping habits stick even when it's tough.

### 1 STAY CONNECTED TO YOUR WHY.

- In your Full Focus Planner, reference your goal details pages as a resource.
- Ask: What are your key motivations?
  - Why did you want this as a goal?
  - What will finishing this goal feel like?
  - How will your world be different when you finish this goal?

### 2 FIND THE RIGHT TRIGGER.

- Form a simple statement that plans for a specific habit in response to an anticipated situational cue.
- Ask: What's an appropriate cue for this new habit?

### 3 PICK THE RIGHT REWARD.

- Look for an incentive.
- Ask: What's an intrinsic reward you can hold on to?

### 4 ANTICIPATE THE REWARD.

- Focus on how the reward makes you feel.
- Turn the incentive into the source of your energy and drive.

### 5 SCALE IT BACK.

- Break your big goals down into manageable habits.
- Ask: Is this habit in your comfort zone, your discomfort zone, or your delusional zone?

### 6 TRAVEL WITH FRIENDS.

- You don't have to go this alone.
- Ask: Who are people you trust you can share your goals with?

## BONUS 10

## 7 Great Habit Tracking Apps

### 1 STRIDES: StridesApp.com

- Beautiful layout with eye-catching and accessible graphs
- Different types of trackers (i.e., target tracker, habit tracker, average tracker)
- Set streak goals for knocking out 30-day challenges
- Customize habit goals as "yes or no"
- Enjoy multiple other customization options

### 2 COACH.ME: Coach.Me

- Cultivate community as you track your habits
- Create plans and share them with your connections
- Join plans created by others
- Integrate a personal coaching feature at an affordable cost

### 3 HABIT LIST: Habitlist.com

- Track habit streaks
- Create flexible schedules
- Set habits to specific days, non-specific days, or intervals
- Use the skip feature for habits when you are on vacation or just want a break

### 4 HABITICA: Habitica.com

- Inspired by RPG video games
- "Gamifies" habit tracking and keeps it fun
- Level up your customized avatar as you make progress with your habit goals
- Partner with friends for quests and missions

### 5 HABITIFY: Habitify.me

- Simple and attractive interface
- Build prioritized lists of habits and check them off as you complete them
- Engage with numerous graphs and charts about your habit progress
- Strictly for iOS, but can be easily synchronized across all iOS devices

### 6 DONE: TreeBetty.com

- Slick and simple habit tracker strictly for iOS
- Multiple customization options
- Track habits you want to build and quit
- Take notes about your habit progress in a Daily Journal
- Group habits into categories for easier navigation

### 7 HABITBULL: Habitbull.com

- A feature-rich habit tracker
- Detailed recording options including detailed feedback about your progress
- Fitness habits can be integrated with GoogleFit
- All data can be backed up on the cloud

## BONUS 11

## The 5 Rs of the Quarterly Preview

At the end of each quarter, we recommend a quarterly preview process. At least five options are possible. We call these the 5 Rs.

**First, you can REJOICE.** Let's say you've reached an important milestone in pursuit of one of your goals. Pause to recognize and celebrate it. We firmly believe in celebrating our wins. Winning helps keep us in the game.

**Second, you can RECOMMIT to the goal.** This can be hard when you feel like giving up and walking off the field. But then you realize the game isn't over. Literally, anything is possible. You never know what may happen. The only thing you can know for sure is that if you quit now, you will lose. The key in this situation is to refocus on the original goal and reconnect to your why. In other words, list what is at stake. What will you gain? What will you lose?

Once you have these in view, you can consider new strategies or find additional resources. But you have to decide, deep in your heart, "I'm going for it." A regular mistake people make at this stage is getting married to their strategy. Your goal is the what, your strategy is the how. There's nothing sacred about your strategy. You can change it at any time if it's not producing results. If we're married to our strategies and they fail us, our goals will suffer. But if we're committed to our goals, we can confidently pivot on our strategies as often as we need to hit our targets.

Now, if you're no longer committed to the goal, **your third option is to REVISE it.** Maybe you've realized that you set the goal in the delusional zone, instead of the discomfort zone. Other facts or circumstances that you could not have known about may come into play—and they may be out of your control. You do have to be careful when revising a goal. You don't want to do it just so you can stay in the comfort zone and not stretch. But you also don't need to put yourself in a no-win situation just to prove a point.


When you can't recommit, and you don't want to revise, **the fourth option is to REMOVE it.** Grab an eraser. Hit delete. Don't let that shock you. It's a last resort but sometimes necessary. If a goal is no longer relevant, if it's no longer compelling, if you've tried to revise it and you can't, then remove it. If you don't, the goal will just sit there and accuse you. There's no need to pay an emotional tax like that on your own list.

**Fifth, and finally, REPLACE.** When you've achieved a goal or removed it from your list, you want to replace it with a new goal. There is no reason to keep on pursuing something that is no longer possible or something you've already accomplished.

And, there you have it—the 5 Rs of your Quarterly Preview process:

Rejoice, Recommit, Revise, Remove, Replace

## BONUS 12



## The Importance of Celebration

The creation account in Genesis tells us God looked at everything he made and called it good. And he didn't wait until the entire creation was done. He did it at each stage. That's a good model for us, too. Recognizing and rejoicing over our progress helps us stay emotionally engaged for the long haul.

Celebrating triggers your brain's reward system, which according to endurance athlete Christopher Bergland, is "a prime motivating force to help you keep pushing and achieve your goals." He says, "Being self-congratulatory isn't about ego or hubris, it is about harnessing your reward circuitry and tapping your dopamine pipeline." Winning helps keep us in the game. So we need to be serious about rejoicing when we score.

Celebrating your wins validates your work. When we skip the celebration, we cheapen our efforts. And we also shortchange our lives and the lives of those closest to us. That's why it's critical to dance across the mile markers. Bring your family into it. Bring your friends into it. However you do it, take time to celebrate. Reinforce it. Let it sink into your nervous system and power you across the goal line.

Because that's where you're headed. You now have the knowledge, the insight, and the confidence to achieve your biggest goals. Don't let this moment pass you by and simply become another memory of when you tried. Instead, may this be your platform for jumping into your best year ever!

The chief idea of my life . . . is the idea of taking things with gratitude, and not taking things for granted.

G. K. CHESTERTON

EXERCISE 6

DETERMINING NEXT STEPS

INSTRUCTIONS AND EXAMPLE

Look at your goals and identify at least one next action for each goal you have scheduled for the upcoming quarter. You don't need a lot of detail. Don't overthink it. Just pick the next, most obvious step.

And along with next steps, it might be helpful to think about how you might use a daily habit or ritual to help you reach your goals.

Finally, take a moment and decide when you'll set your Weekly and Daily Big 3s, along with conducting your Weekly Preview. Build this into your daily rituals and Ideal Week. Remember, what gets scheduled gets done. Book appointments with yourself so that the urgent doesn't take priority over the important. You can do the Weekly Preview in your Full Focus Planner, but we've included three blank templates to get you started, beginning on page 117.

EXERCISES

GOAL SUMMARY / Write your SMARTER goal.

☒ ACHIEVEMENT GOAL☐ HABIT GOAL

Run the Country Music Half Marathon by April 21.

Domain

☐ SPIRITUAL☐ PARENTAL☐ INTELLECTUAL☐ SOCIAL☐ EMOTIONAL☐ VOCATIONAL☒ PHYSICAL☐ RELATIONAL☐ FINANCIAL

KEY MOTIVATIONS / Write then rank your key motivations.

1

Running is a great way to stay in shape and, as a result, show up as my best self for my kids.

2

If I don't run, I tend to get overwhelmed easily and my priorities, such as spending time with my family, can become skewed.

3

Running is how I destress and help manage my anxiety.

NEXT STEPS / List the first few actions you need to take to reach your goal.

Set a running schedule with Jamie.

Sign up to run with my church on Saturdays.

YOUR REWARD / Decide how you will celebrate once you achieve your goal.

STREAKTRACKER™ / Check off your progress as you go (helpful for habit goals).

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GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal.

☐ ACHIEVEMENT GOAL ☐ HABIT GOAL

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| Domain | <input type="radio"/> SPIRITUAL | <input type="radio"/> INTELLECTUAL | <input type="radio"/> EMOTIONAL  | <input type="radio"/> PHYSICAL    | <input type="radio"/> RELATIONAL |
|        | <input type="radio"/> PARENTAL  | <input type="radio"/> SOCIAL       | <input type="radio"/> VOCATIONAL | <input type="radio"/> AVOCATIONAL | <input type="radio"/> FINANCIAL  |

KEY MOTIVATIONS / Write then rank your key motivations.

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NEXT STEPS / List the first few actions you need to take to reach your goal.

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YOUR REWARD / Decide how you will celebrate once you achieve your goal.

STREAKTRACKER™ / Check off your progress as you go (helpful for habit goals).

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| M1 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M2 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M3 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |

GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal.

☐ ACHIEVEMENT GOAL    ☐ HABIT GOAL

Domain

☐ SPIRITUAL    ☐ INTELLECTUAL    ☐ EMOTIONAL    ☐ PHYSICAL    ☐ RELATIONAL

☐ PARENTAL    ☐ SOCIAL    ☐ VOCATIONAL    ☐ AVOCATIONAL    ☐ FINANCIAL

KEY MOTIVATIONS / Write then rank your key motivations.

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NEXT STEPS / List the first few actions you need to take to reach your goal.

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YOUR REWARD / Decide how you will celebrate once you achieve your goal.

STREAKTRACKER™ / Check off your progress as you go (helpful for habit goals).

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| M1 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M2 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M3 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |

GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal.

☐ ACHIEVEMENT GOAL    ☐ HABIT GOAL

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| Domain | <input type="radio"/> SPIRITUAL | <input type="radio"/> INTELLECTUAL | <input type="radio"/> EMOTIONAL  | <input type="radio"/> PHYSICAL    | <input type="radio"/> RELATIONAL |
|        | <input type="radio"/> PARENTAL  | <input type="radio"/> SOCIAL       | <input type="radio"/> VOCATIONAL | <input type="radio"/> AVOCATIONAL | <input type="radio"/> FINANCIAL  |

KEY MOTIVATIONS / Write then rank your key motivations.

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NEXT STEPS / List the first few actions you need to take to reach your goal.

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YOUR REWARD / Decide how you will celebrate once you achieve your goal.

STREAKTRACKER™ / Check off your progress as you go (helpful for habit goals).

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| M1 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M2 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M3 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |

GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal. ⓪ ACHIEVEMENT GOAL ⓪ HABIT GOAL

Domain

⓪ SPIRITUAL

⓪ PARENTAL

⓪ INTELLECTUAL

⓪ SOCIAL

⓪ EMOTIONAL

⓪ VOCATIONAL

⓪ PHYSICAL

⓪ AVOCATIONAL

⓪ RELATIONAL

⓪ FINANCIAL

KEY MOTIVATIONS / Write then rank your key motivations.

NEXT STEPS / List the first few actions you need to take to reach your goal.

YOUR REWARD / Decide how you will celebrate once you achieve your goal.

STREAKTRACKER™ / Check off your progress as you go (helpful for habit goals).

|    |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
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| M1 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M2 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M3 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |

GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal.

☐ ACHIEVEMENT GOAL    ☐ HABIT GOAL

|        |                                 |                                    |                                  |                                   |                                  |
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| Domain | <input type="radio"/> SPIRITUAL | <input type="radio"/> INTELLECTUAL | <input type="radio"/> EMOTIONAL  | <input type="radio"/> PHYSICAL    | <input type="radio"/> RELATIONAL |
|        | <input type="radio"/> PARENTAL  | <input type="radio"/> SOCIAL       | <input type="radio"/> VOCATIONAL | <input type="radio"/> AVOCATIONAL | <input type="radio"/> FINANCIAL  |

KEY MOTIVATIONS / Write then rank your key motivations.

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NEXT STEPS / List the first few actions you need to take to reach your goal.

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|    |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
|----|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| M1 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M2 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| M3 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |

GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal.

☐ ACHIEVEMENT GOAL    ☐ HABIT GOAL

|        |                                 |                                    |                                  |                                   |                                  |
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| Domain | <input type="radio"/> SPIRITUAL | <input type="radio"/> INTELLECTUAL | <input type="radio"/> EMOTIONAL  | <input type="radio"/> PHYSICAL    | <input type="radio"/> RELATIONAL |
|        | <input type="radio"/> PARENTAL  | <input type="radio"/> SOCIAL       | <input type="radio"/> VOCATIONAL | <input type="radio"/> AVOCATIONAL | <input type="radio"/> FINANCIAL  |

KEY MOTIVATIONS / Write then rank your key motivations.

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GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal. ☐ ACHIEVEMENT GOAL ☐ HABIT GOAL

Domain

☐ SPIRITUAL

☐ INTELLECTUAL

☐ EMOTIONAL

☐ PHYSICAL

☐ RELATIONAL

☐ PARENTAL

☐ SOCIAL

☐ VOCATIONAL

☐ AVOCATIONAL

☐ FINANCIAL

KEY MOTIVATIONS / Write then rank your key motivations.

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GOAL DETAIL

GOAL SUMMARY / Write your SMARTER goal.

☐ ACHIEVEMENT GOAL    ☐ HABIT GOAL

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|--------|---------------------------------|------------------------------------|----------------------------------|-----------------------------------|----------------------------------|
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|----|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
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## WEEKLY PREVIEW

**STEP 1** MY BIGGEST WINS / List 3-5 major accomplishments from the past week.

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**STEP 2** AFTER ACTION REVIEW / Refer to your last Weekly Big 3

How far did you get?

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COMPLETE

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What worked? What didn't?

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What will you keep, improve, start, or stop doing?

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**STEP 3   LIST SWEEP /** Process action items and consider next steps.

- ☐   DEFERRED TASKS      Add any Big 3 or Other Tasks you didn't complete to your task manager.
- ☐   DELEGATED TASKS      Add unassigned tasks or desired status updates to your task manager.
- ☐   DAILY NOTES            Add any assignments or action items to your task manager.
- ☐   GOALS                    Review your annual and/or quarterly goals.

**STEP 4   WEEKLY OVERVIEW /** List important events, deadlines, and tasks in the coming week.  
Use weekly view on the next page if helpful.

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| TUESDAY   |        |
| WEDNESDAY |        |
| THURSDAY  |        |
| FRIDAY    |        |
| SATURDAY  | SUNDAY |

**STEP 5**   WEEKLY BIG 3 / List three objectives to advance your goals and projects this week.

**STEP 6**   SELF-CARE PLANNER / Brainstorm below, then schedule your rejuvenation on the Daily Pages.

## WEEKLY PREVIEW

**STEP 1** MY BIGGEST WINS / List 3-5 major accomplishments from the past week.

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**STEP 2** AFTER ACTION REVIEW / Refer to your last Weekly Big 3

How far did you get?

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COMPLETE

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What worked? What didn't?

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What will you keep, improve, start, or stop doing?

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FRIDAY

SATURDAY

SUNDAY

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WEEKLY PREVIEW

**STEP 1** MY BIGGEST WINS / List 3-5 major accomplishments from the past week.

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**STEP 2** AFTER ACTION REVIEW / Refer to your last Weekly Big 3

How far did you get?

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COMPLETE

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What worked? What didn't?

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MONDAY

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WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

SUNDAY

**STEP 5**   WEEKLY BIG 3 / List three objectives to advance your goals and projects this week.

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SLEEP

EAT

MOVE

CONNECT

RELAX