

# Goal Setting & Personal Planning — Workbook

This workbook turns the course into a finished personal plan. Work through one section per module, in order, and you will leave with screened goals, SMART and WOOP rewrites, a milestone roadmap, and an accountability and weekly-review system you can run on your own. Use the templates to track everything in one place, and revisit them every week.

## Choosing Goals That Matter

Screen every candidate goal against your values, its real cost, and a short list of true priorities before you commit to anything.

### Exercise: Name your values and spot borrowed goals

Write down your three to five core values in plain words. Then list every goal you are currently considering and label the honest source of each one.

- What are my three to five core values, stated in single words such as health, autonomy, family, craft, or security?

---

- For each candidate goal, which value does it actually serve, and is the source genuinely mine or borrowed?

---

- Which goals on my list are comparison, should, or avoidance goals, and would I still want them if no one ever found out I achieved them?

### Worksheet: Cost worksheet for each candidate goal

Fill in one row per goal so the true price is visible before you commit. Be specific with numbers and name the exact tradeoff.

Goal name

---

Value it serves

---

Hours per week required

---

Number of weeks to completion

---

Total estimated hours

---

Money cost (tools, fees, equipment)

---

What I will do less of (the tradeoff)

---

---

### Exercise: Score and pick your one to three priorities

Rate every candidate goal high, medium, or low on impact, leverage, and timing, then promote only the strongest to active and park the rest with a target quarter.

- If I achieved only one of these goals this year, which one would make the year feel like a win (highest impact)?

---

- Which goal, if completed, would make other goals easier (highest leverage, a keystone goal)?

---

- Is this genuinely the right season for each goal given my work, health, and obligations, and which goals belong on the parking list for a later quarter?

### Checklist: Goal selection is complete when

I have written down my three to five core values

Every candidate goal is labeled mine or borrowed with its source named

Each candidate goal has an estimated hour count, money cost, and named tradeoff

I have chosen one primary goal plus at most two secondary goals

Every goal I am not pursuing now sits on the parking list with a target quarter

### Writing Goals So They Actually Work

Rewrite each priority goal in SMART format, pressure-test it with WOOP, and layer outcome, performance, and process versions.

### Worksheet: SMART rewrite for each priority goal

Rewrite each priority goal so every SMART letter is genuinely satisfied. Then add the SMARTER review point. Write a full sentence in the final field that contains the action, number, and deadline.

Goal name

---

Specific (exact action, who, where, how)

---

Measurable (the number to check)

---

Achievable (why it is a realistic stretch)

---

Relevant (which value or objective it serves)

---

Time-bound (the deadline date)

---

Review point (when I will evaluate it, e.g. monthly)

---

Final one-sentence SMART goal

---

### Exercise: Run WOOP on each priority goal

Work through Wish, Outcome, Obstacle, and Plan for each goal. Keep the obstacle internal, such as a habit or emotion, not the weather or other people, and write an if-then plan you will actually use.

- Wish and Outcome: what is the challenging-but-feasible goal, and how exactly will it feel to achieve it?

---

- Obstacle: what is the main inner obstacle inside me, such as a habit, emotion, or excuse, that stops me?

- 
- Plan: what is my if-then plan in the form if obstacle X happens, then I will do Y?
- 

### Worksheet: Outcome, performance, and process layers

For each priority goal, write all three altitudes. Then circle the process goal, because that is the behavior you will schedule on your calendar.

Goal name

---

Outcome goal (the final result)

---

Performance goal (a measurable personal standard)

---

Process goal (the behavior I fully control)

---

How often the process goal happens (daily, weekly)

---

### Checklist: Goal writing is complete when

- Each priority goal is rewritten so every SMART letter is true, not just present
- Each goal has a scheduled review point (the SMARTER addition)
- Each goal has a WOOP if-then plan targeting an internal obstacle
- Each goal has an outcome, performance, and process version written out
- The process goal for each goal is circled and ready to schedule

### From Goal to Milestones to Weekly Actions

Break each goal into dated milestones, lay them on a twelve-week roadmap, and schedule this week's actions with the Eisenhower Matrix.

### Worksheet: Milestone map (plan backward from the deadline)

Start at the deadline and work backward. For each priority goal, define milestones two to six weeks apart, each with a number and a date and the deliverable that proves it is done.

Goal name and final deadline

---

Final state in concrete terms (e.g. draft complete at 50,000 words)

---

Milestone description

---

Milestone target number

---

Milestone date

---

Deliverable that proves the milestone is done

---

### Exercise: Translate the first milestone into weekly tactics

Take the milestone due at the end of your current twelve weeks and decide what must happen each week to reach it, written as concrete tactics.

- Which milestone is due at the end of my current twelve weeks, and what must be true each week to reach it?  
\_\_\_\_\_
- Where do two milestones collide on my timeline, and which one can I pull earlier to relieve the crunch?  
\_\_\_\_\_
- Which weeks contain known interruptions like travel or holidays, and how will I lighten the load around them?  
\_\_\_\_\_

### Worksheet: Eisenhower sort and time-block for this week

Sort this week's tasks into the four Eisenhower quadrants, then block your goal actions onto the calendar first, before fixed commitments, leaving a 20 percent buffer.

Urgent and important (do now)

\_\_\_\_\_

\_\_\_\_\_

Important but not urgent (schedule it, where goal work lives)

\_\_\_\_\_

\_\_\_\_\_

Urgent but not important (delegate or batch)

\_\_\_\_\_

\_\_\_\_\_

Neither (delete)

\_\_\_\_\_

\_\_\_\_\_

Goal actions and the exact day and time blocked for each

\_\_\_\_\_

\_\_\_\_\_

Buffer time left unscheduled (target 20 percent)

\_\_\_\_\_

\_\_\_\_\_

### Checklist: Planning is complete when

- Each goal has a milestone map planned backward from its deadline
- Every milestone has a number, a date, and a proof-of-done deliverable
- The first milestone is broken into concrete weekly tactics
- This week's tasks are sorted into the four Eisenhower quadrants
- Goal actions are time-blocked onto the calendar with a 20 percent buffer left free

## Accountability, Habits, and the Weekly Review

Make goal actions automatic with habits, add accountability with real stakes, and set up the weekly review that keeps the whole plan alive.

### Worksheet: Implementation intentions and habit stacks

For each process goal, write an implementation intention in the form I will do X at time Y in place Z, then design a habit stack that attaches it to an existing habit, with a two-minute starting version.

Process goal

\_\_\_\_\_

\_\_\_\_\_

Implementation intention (behavior, time, place)

\_\_\_\_\_

\_\_\_\_\_

Existing habit to stack onto (after I do A, I will do B)

\_\_\_\_\_

\_\_\_\_\_

Two-minute starting version of the habit

Cue that will trigger it

### Exercise: Design your accountability system

Choose which accountability levels you will use and make them concrete. Aim for at least a weekly check-in with one partner plus self-tracking, and add stakes for any goal you keep dropping.

- Who is my accountability partner, what day and time is our recurring check-in, and what three questions will we answer each time?
- Will I make a public commitment, and to whom or which community?
- For goals I keep dropping, what stakes will I attach (a bet, StickK, Beeminder), and what is the cost of missing?

### Worksheet: Written commitment statement

Draft a short signed commitment for each priority goal. A witnessed, written commitment is far harder to quietly drop than a private intention.

I commit to (goal in one sentence)

By (deadline date)

My accountability partner is

We check in every (day and time)

If I miss, the consequence is

Signed and dated

### Checklist: Systems are in place when

- Each process goal has an implementation intention with a time and place
- At least one habit stack is designed with a two-minute starting version
- I have a named accountability partner and a recurring check-in time
- I have a signed written commitment for each priority goal
- My weekly review is scheduled at a fixed time and I have a review template ready

## Your Action Plan

1. List every goal you are considering, then screen each against your values and label it mine or borrowed.
2. Run the cost worksheet on each candidate, estimating hours, money, and the specific tradeoff, then cut to one to three priorities and park the rest.
3. Rewrite each priority goal in full SMART format and add a monthly review point (SMARTER).
4. Run WOOP on each goal and write an if-then plan that targets your main internal obstacle.
5. Write the outcome, performance, and process version of each goal and circle the process goals.
6. Build a milestone map for each goal, planning backward from the deadline with a number and

date on every milestone.

7. Lay the milestones on a twelve-week roadmap and translate the first milestone into weekly tactics.

8. Each week, sort tasks with the Eisenhower Matrix and time-block your goal actions first, leaving a 20 percent buffer.

9. Set up your habits, accountability partner, and signed commitments, with stakes on any goal you keep dropping.

10. Schedule a fixed weekly review and run the review-update-reflect-reset agenda every week without fail.











