

Part 3 January: Realistic Goals for Quarter 1

The first few years I did annual planning, I started with big ideas in January that didn't flow smoothly along the rough terrain of real life by March. I began with big plans then threw it all away when I grew tired and dejected after a few months. I'm suggesting a gentler, more sustainable way forward.

"Plans are worthless, but planning is everything." - Dwight D. Eisenhower

The perfect first plan knows it is imperfect. *Planning is useful even when (especially when!) we surrender to the knowledge that our first plan is unfinished.*

We will learn and grow across the year. Our job today is simply to begin and prioritize what we will do first among all our annual plans. I suggest two different ways to do this, either focusing on just a few things, or picking a thematic goal for each life bucket.

Exercise 3.1 Just A Few Things

Time needed: 15 minutes

Instructions: Review your first draft annual goals. Simply pick one to three things you will focus on in 2026 quarter one (in other words, January, February, and March).

*“Withdraw your attention from everything except the battles you chose to fight.”
- Oliver Burkemann in “Meditations for Mortals”*

Over the next few months, I will focus my time and energy on just a few things:

Kerry's Example:

What I will focus in the next few months:

- SELF: increase physical health
- LOVE/FAMILY: maintain family and friend relationships
- COMMUNITY: –
- TRADE/PROFESSION: decline international travel, focus on local work

Exercise 3.2 Headlines and Commitments

Time needed: 20-30 minutes

Instructions:

- Review your first draft annual goals.
- Headline: Pick an overarching theme or valued-goal for each life bucket.
- Specific Commitments for the year: For each bucket, brainstorm a few commitments that exemplify that goal or theme.
 - The commitment is usually a SMART (specific, measurable, achievable, realistic and timely) goal.
- Prioritizing for the quarter: Look over all the possible commitments. Again, being thoughtful, kind, and practical, choose just a few to focus on this quarter.

- **LIFE BUCKET: Headline**

- specific, measurable, achievable, realistic and timely goal

Headlines and commitments for the **year**.

- SELF
- LOVE/FAMILY
- COMMUNITY
- TRADE/PROFESSION

Headlines and commitments for the **quarter**.

- SELF
- LOVE/FAMILY
- COMMUNITY
- TRADE/PROFESSION

- **LIFE BUCKET: Headline**

- *specific, measurable, achievable, realistic and timely goal*

Kerry's Example - Headlines and commitments for the year.

- **SELF: Strong and flexible!**
 - A few minutes of stretching in the morning
 - Weight lifting 1-2 times a week
 - Swimming regularly if I want to because it's fun.
- **LOVE/FAMILY: Surrounded in love, stay open.**
 - Maintain family and friend relationships
 - Watch my tendency to avoid new things (like unexpected social invitations). Instead, practice sharing or 'outing myself' and saying yes.
- **COMMUNITY: Give generously while being kind to myself.**
 - Experiment with ways to give free trainings.
 - Let go of perfectionism in business practices. Allow myself time and space to respond to emails more slowly and make mistakes in writing.
- **TRADE/PROFESSION: Have fun.**
 - Sign up to do things you love.
 - Say no to things that you think will impress other people but you don't actually want to do.
 - Continue regular journaling - this feels like it benefits all the buckets.

Kerry's Example - Headlines and commitments for these three months, the first quarter of the year.

- **SELF: Strong and flexible!**
 - Weight lifting 1 time a week
- **LOVE/FAMILY: Surrounded in love, stay open.**
 - Maintain family and friend relationships
 - Just try to stay open.
- **COMMUNITY: Give generously while being kind to myself.**
 - Nothing this quarter!
- **TRADE/PROFESSION: Have fun.**
 - Continue regular journaling - this feels like it benefits all the buckets.

