

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.

