Annual Planning Blueprint
Year 20\_\_

# How to Use This Document (Note from Ben)

Congratulations on taking your life to a *whole* new level. I have spent years doing this process, studying the most effective ways to set goals, and I’m excited to share this information with you.

This document starts by doing a review of your previous year. That section was put together by my man Robin Arenson, who has done the annual review process with me for many years now, and wrote most of the review section. Next, you establish your VISION. This is essential. If you are not connected to who you are committed to being as a person and in the world, then nothing else will matter (or happen). Take those sections seriously. Also, there is a place to set forth your vision for *each domain* as well. For example, in the health domain you can outline what your overall vision for your body is (have a 6-pack, always be energized and well-rested, etc.), and then break down into GOALS the specific ways that you will accomplish that (going to the gym, etc.).

For the goal section, I have outlined here a lot of the research I have done in effective goal setting. I can assure that every second you spend getting specific and connected to this will dramatically increase the likelihood that you accomplish what you set out to do and be.

Finally, I have included the domains I track in my life, but you might want to add or subtract the domains that are specific to your life and situation.

Please [contact me](http://www.benwhitehair.com/ben/contact.html) and let me know how this supports you, and what you are creating in your life. ☺

Sincerely,
Ben Whitehair
[BenWhitehair.com](http://BenWhitehair.com)

Annual Review: the Previous Year
Looking Back

# Goals

* Gain clarity on the events of the previous year and create a narrative connecting the you of a year ago to the you of now
* Declare and analyze what did and didn't work in the previous year in order to form a blueprint for creating goals for the coming year
* Use the most important moments of the previous year to chart specific paths of growth and change that occurred around and between those points
* Declare a theme for the previous year to contextualize the events and moments in the analysis of strengths and weaknesses

# Deliverables

* A list of 10-20 most important moments of the year. These are specific moments in time, not events or periods of time. A good example would be "when I looked into her eyes and realized I loved her". A bad example would be "that trip we took to Vegas". These moments do not need to be "good"; they are meant to be important points of growth, happy or not.
* A list of "What Worked" - aspects of your life that went well
* A list of "What Didn't Work" - aspects of your life that need work
* A theme for the year

# Process

* Take turns telling the story of the previous year, month-by-month, and major event by major event. Throughout this process, begin adding to your Top Moments list. You might also begin making notes on a possible theme.
* Take turns discussing and listing What Worked and What Didn't Work. Again, add to your Top Moments list as you go.
* Run over your three lists, add anything you may have forgotten, and solidify your theme for the year.
* Throughout the discussion, remember that this process should be collaborative and spontaneous. Ask each other questions and engage on any subjects that might come up. Don't be afraid to deep-dive into subjects tangential to the process. The idea is not to check things off of a list but to use the process as a guideline for an organic, constructive, collaborative conversation.

# Looking Forward

Once you have completed your annual review looking back, you begin setting your vision and goals for the coming year….

# How to Set Goals

### Be [S.M.A.R.T.](http://en.wikipedia.org/wiki/SMART_criteria)

Goals should be Specific, Measurable, Attainable, Relevant, and Time-Bound. After years of setting goals and re-evaluating how I did (also key), I have learned that when I create specific goals that I have direct control over, they get done. If my goals are vague, I get vague results. This is also where the distinction between vision and goals becomes important. For example, (See below for more examples.)

### Make them Meaningful

Goals must be personally meaningful to motivate you. If you are not emotionally invested in your goal, it won't happen. So be SUPER specific in WHY a goal is important. For each goal ask yourself "Why is accomplishing this goal important to ME?" Not just in general, or for a vague reason like "it will make my life better." Be specific. If you can't find a meaningful reason you need to dig deeper, set a new goal, or work to create an emotional attachment/investment in that goal. Connect it to your vision. Match it to who you want TO BE as a person.

Envision Yourself Accomplishing The Goal
Also, envisioning yourself achieving the goal is very important. If you can't see yourself accomplishing the goal, it's much less likely to happen. If you're not there yet, spend even a couple minutes each day visualizing what it would look, feel, smell, sound, taste like as you are accomplishing said goal.

Set Process Goals
Having a clear goal around an outcome is great, but high performers set goals about the PROCESS that will get them there. A goal to "lose weight" is much less effective than a goal around going to the gym (the process that gets you to the outcome of losing weight).

Learning Goals
Research has shown that setting goals about *learning* are more effective than an outcome-based goal. For example, setting a goal of learning your 3 favorite exercises has been shown to be more effective than a goal of losing 10 pounds.

Just Start
Research also indicates that setting a seemingly minor goal on path the larger vision is effective. For example, if you want to lose weight, rather than setting a goal of working out for 2 hours, 3 times per week, set a goal around simply putting on your gym clothes and walking in the door. This might mean that every once in a while you truly do step foot in the gym and walk right back out. But most likely, more than not, you will get to the gym and actually do *something* which is FAR better than not doing anything because the goal you set becomes overwhelming.

Examples
Bad goal: Be healthier.
Mediocre goal: Lose 5 pounds
Good goal: Go to the gym 3 times per week.
Great goal: Step foot inside the gym wearing my gym clothes, 3 times per week. Learn my favorite exercise.
Best goal: On Mon, Wed, and Fri at 8am, step foot inside the gym wearing my gym clothes. Learn my favorite 3 exercises.

## Tracking Goals

One of the reasons it’s important to set measurable goals, is so that you can track your progress. If you can’t track it, you won’t know your progress (or lack thereof). You can use the text immediately below **to copy and paste into the sections below as you see fit**.

This could be a small section of the Health domain:

🞏 On Mon, Wed, and Fri at 8am, step foot inside the gym wearing my gym clothes. Learn my favorite 3 exercises.
🞏 Average 6 hours of sleep per night (track with [Zeo](http://myzeo.tellapal.com/a/clk/3Qcv4b))
🞏 Take my vitamins every day (multi-vitamin, fish oil, green tea)
🞏 Get a deep tissue massage at least once per month
 🞏 January – Wasn’t sure where to go…maybe should have set a goal or action item around finding a good massage therapist
 🗹 February – accomplished on 2/3, yay! Feeling the difference already.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Week of: | 1/1 | 1/7 | 1/14 | 1/21 | 1/28 | 2/4 | 2/11 | 2/18 |
| # workouts | 2 this wk | 3 | 3 + hike | Etc. … |  |  |  |  |
| Weight | 148 lbs | 150lbs | 146 lbs | Etc. … |  |  |  |  |
| Body Fat % | 11.7% | 11.1% | 10.8% | Etc. … |  |  |  |  |
| Average sleep | 6 hrs | 7.5 hrs | 8 hrs! | Etc. … |  |  |  |  |
| Vitamins daily | Yes! | No (4/7) | Yes! | Etc. … |  |  |  |  |

# Vision For Myself

Who do you get to be each and every day such that you are proud of who you are, what you do, and who you be? What type of person are you? How do you treat others, what is your attitude right before you go to sleep, what do you evoke in others? What are your principles and how do they show up in your life?

# Vision For the World

What type of world are you committed to creating? Is there peace, abundance, health, prosperity, joy, and social justice? How do people treat each other? What emotional, physical, and spiritual environment will your children’s children be given?

# Top 5 Most Important Outcomes Of Year Ahead

If you accomplish *nothing* else this year, what is most important to you? When you look back on this year 12 months from now, what would make you most proud, elated, jubilant to have as true? This will guide you in making decisions throughout the year. When faced with an opportunity, you can measure it against these outcomes. Does the opportunity move you closer to them or farther away?

# Theme Of Year

I prefer to pick three words that I want to define and guide me in the coming year. For example, “Intentional. Scale. Abundance.” or “Power. Integrity. Vulnerability.” However, this could also be a phrase, or even a song. Anything that you have an emotional tie to, and will evoke in you a return to your principles and intentions formed at the beginning of the year.

Domains
The Areas of Life

Dignity: “The state or quality of being worthy of honor or respect.”
*Integrity, Lifestyle, Productivity, Time Management, Etc.*

“To bear defeat with dignity, to accept criticism with poise, to receive honors with humility--these are marks of maturity and graciousness.”
~William Arthur Ward

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Relationships
*Romantic Partner(s), Friendships, Strangers, etc.*

“Surround yourself with great people, and you will accomplish great things.”
~Ben Whitehair

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Family
*By Blood and/or By Choice*

“What can you do to promote world peace? Go home and love your family.”
~Mother Teresa

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Service, Community, & World
*Giving Back in Every Way*

“I am of the opinion that my life belongs to the whole community and as long as I live, it is my privilege to do for it whatever I can. I want to be thoroughly used up when I die, for the harder I work the more I live.”
~George Bernard Shaw

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Spirituality & Inner Growth
*Connection on ALL Levels*

“Your inner strength is your outer foundation”
~Allan Rufus

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Education
*Reading, Training, Classes, etc.*

"Education is not the filling of a bucket, but the lighting of a fire."
~William Butler Yeats

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Money & Finance
*General, Earning, Giving, & Saving*

"Lack of money is no obstacle. Lack of an idea is an obstacle."
~Ken Hakuta

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Career
*Your Passion, Life Work*

“I've learned that making a 'living' is not the same thing as 'making a life'.”
~Maya Angelou

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Work
*That Which Sustains, Pays the Bills*(might be same as career)

"Opportunity is missed by most people because it is dressed in overalls and looks like work."
~ Thomas A. Edison

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Creative
*Writing, Performing, Painting, Starting Businesses, & Beyond*

“Imagination is more important than knowledge. For while knowledge defines all we currently know and understand, imagination points to all we might yet discover and create.”
~Albert Einstein

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Health & Fitness
*Integrity, Lifestyle, Productivity, Time Management, Etc.*

“Health is a state of complete physical, mental and social well-being, and not merely the absence of disease or infirmity”
~Anonymous

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Recreation & Play
*Travel, Social Life, Having Fun!* ☺

“Play is the only way the highest intelligence of humankind can unfold.”
~Joseph Chilton Pearce

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)

Not-To-Do
*Integrity, Lifestyle, Productivity, Time Management, Etc.*

“We should cultivate the ability to say no to activities for which we have no time, no talent, and which we have no interest or real concern. If we learn to say no to many things, then we will be able to say yes to the things that matter most. ”
~Roy Blauss

## Vision

Here

## Goals/Action Plan

🞏 Goal 1
🞏 Goal 2
 🞏 Sub-goal 1

**WHY do you want these things?**

Answer here

## Immediate Next Step(s)