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A HUMAN APPROACH TO GOALS, REFLECTION, AND DIRECTION

HOW I LEARNED TO STOP WORRYING AND LOVE THE GOALS

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I've been writing yearly goals for far too long. Either in my own annual reviews, annual reviews for my employees and others, or (more valuable) my own, personal goals and have been really reflecting on the process and actual goals with writing them. After reflecting on past goals, being quoted in Forbes, and having people reach out to help get their own goals going, I figured I could put together something to share the info and knowledge easily.

This is heavily leaning on your own personal goals, but I explain how to think about work and annual review goals as well (and no, it's not SMART or STAR goals).

This is a living, dynamic process and document. I'll try to keep up on it as I can. If you read this, and try any (or all?!) of it, and have any sort of feedback, LET ME KNOW! Let's keep this up for everyone!

HOW TO USE THIS GUIDE (BREATHE)

Let's set the tone first. This is not some "perfect system" that will solve all your problems. Setting goals is very personal, intimate, and different for everyone. Some people will want to have smaller, extremely granular goals, while others will be overwhelmed by that and need higher-level views. What you put down will largely reflect your current state of mind. Feeling like you put on too much weight this year? You'll probably feel like you need goals around that. Just got crappy feedback at work? You'll probably have the urge to get out of there. I'll digress, but the point to take from this is that your current (even short-term) state of mind will likely be reflected in these goals. Take your time; this doesn't need to be (and shouldn't be) done in one sitting.

This also isn't a one-and-done type of process. You need to jot things down, chew on them a bit, then revisit while nailing them down, and also throughout the year.

WHY MOST GOAL-SETTING FEELS OFF

So many goals are treated as if you either passed or failed (and we typically focus more on the latter). You shouldn't be judged on things you aspired to accomplish or try. If something didn't get done or wasn't a fit, it's a great opportunity to reflect and ask why. When reviewing, we also tend to focus solely on what was written down a year ago and ignore everything else that was accomplished that year.

Sometimes we need to completely pivot due to unforeseen circumstances or opportunities that come up. Rarely are goals revisited, and pivots acknowledged. Rigidity is a curse here. Shit happens, and we need to be OK and adapt to it. Waiting a full year to see where things are at means we've already missed the mark. If you only talked to someone once a year, how could you possibly explain or hear all the things that happened that year?

We also tend to focus on the life we should be living, and not the life we want to be living. Work, community, parents, culture, etc., tell us what our life should look like. "You should be going for that promotion", "You need 2.5 perfect children", "You should have the best house and brand new car", "If you aren't stressed, you aren't trying hard enough", "You need to research a new product line for the business". Any of those sound familiar? Are they things you truly want in life, or are they external pressures that you are actively or subconsciously being told? Your goals should align with you.

Lastly, treating goals as a finish line that must be crossed enforces that pass/fail mentality. What if you started working towards a goal and found that it really wasn't fitting well, and just became a grind to say you did it? If you treat them more akin to experiments, it provides permission to say, "This sucks, and I hate it. I tried it, and it just isn't something I need to do. I now know this about myself." So often we set fitness goals for ourselves at the beginning of each year, and so often we keep paying for those gym memberships because we said we were going to do it, even though we only went a couple of times in January. It's OK if it didn't get done. You tried it, made some progress, and decided it wasn't worth continuing. Maybe you'll take what you learned from that and pivot towards something else? Maybe exercise isn't the issue here, but the barrier of entry to get to a gym several times a week with your busy schedule?

REFLECTION AS STRATEGY

We need to define purpose, not things. Once we have a better idea of purpose, then we can align to that. Taking time to reflect on what felt right and what didn't, and asking "Why" against a goal until you get to the real reason and a deeper understanding of why you wrote it, helps you determine if this truly is something you want to have.

How about a real-life example?

This past year, I put down "Go surfing more" (how Californian of me) after having a year where I never got out there. Seems reasonable enough, but when I took a step back and asked why, I found a very different intention.

Why do I want to surf more?
Because it's fun and I enjoy being in the ocean

Why does that matter?
Because I want to go outside more and move my body

Why is that important?
Because I want to be healthier and have more energy

Why does that matter?
Because I want a longer, healthier life and to feel good in my day-to-day.

Turns out, I had another year where I didn't go surfing one time. However, I found another sport that moved more towards that goal than a few surf outings would have done (outrigger canoe racing).

Look back on what felt good, what you did but didn't enjoy, what you didn't do, and why. Dig deep. What was it about the ones that felt good that made them feel right? What about the ones that you didn't enjoy as much but still got done? Why didn't they feel good? Was it just pushing you out of your comfort zone a bit? Why was it uncomfortable?

This reflection helps shape your purpose. Your purpose helps you align your goals with what you want to be. It's not about proving anything to yourself or others; it's about being true to who you are and how you want to live.

START WITH THE LONG VIEW (10 YEARS OUT)

Imagine your life in 10 years. Not what you think it will look like, but what it would ideally look like. Where are you living? Who's around you? What do your finances look like? When you open your eyes in the morning, what's the first thing you're doing? What does the rest of your day look like? Don't just start with "living in a mansion on piles of money." That's likely society telling you what you want. What do you actually want?

Are you giving a nice stretch before you walk over and open your doors overlooking a tropical beach in Bali, checking your schedule to see what surf lessons you're giving that day while your partner runs the family organic tea and fruit stand? First off, that sounds amazing. Secondly, why? What are you trying to accomplish with that? It's something, and you need to figure out what that is. Is it the freedom from corporate grind, or maybe the 'golden handcuffs' and lifestyle creep? Likely it'll be a LOT of things. Only you'll know that, and asking those 5 Whys will help you determine that.

WORK BACKWARDS (WITHOUT LOCKING YOURSELF IN)

Ok, so you have this mental image of your life 10 years out. If you truly want to live that life, how do you make that happen? Why not put things in place now to get there? Huge changes typically take time.

What would feel like good progress towards that life in 5 years? 3 years? 1 year?

What small steps can you take in the next year to get closer to that goal? It's not so much a roadmap, as much as building the momentum, improving your life each year to get closer to that goal. It's ok to be a little vague here; you have your guiding light, keep moving towards it.

THEMES BEFORE GOALS

The goal here is to determine the themes you're pushing for. This sounds backwards considering the section heading, but sometimes you need to write down what you think your goals are to see the commonalities. Just get the stuff out of your head, then you can organize it. This also helps you see some of those outlier goals and re-ask yourself, "Why do I have this?"

You can even do this KJ Style and put down all your thoughts on notes, then physically group them into the commonalities to determine the themes.

Once you have all your goals laid out, what are the common threads you see? It might be a bit revealing as to where your head's at. Do those themes help you achieve your ultimate 10-year goal? No? Do they still need to be there (they might)? You don't need a theme for everything, but the ones that don't fit in a theme should get scrutinized a bit more.

Hopefully, you've nailed them down to no more than 5-6 themes. Now is the time to (re)write those goals so they align better and actually move the needle on where you want to go.

Here are my 2026 themes, for example:

- Health & movement
- Work & craft
- Relationships
- Lifestyle & environment
- Exploration

Maybe you want to separate your personal themes vs your business or work themes. Both should be helping you get towards that 10-year goal, though.

DIRECTIONAL GOALS VS. EXECUTABLE TASKS

It's so tempting to write clear, hard goals so you have something easy to measure against at the end of the year and leave it at that. Do the thing X times. Finish this specific project. etc. This is how (execution), you need to focus on the why. Having goals written like that is ripe for that pass/fail mentality as well. Only did it 9/10 times? So sorry, you've failed.

We need to focus on the why (direction) more than the how. "Go to the gym 4x a week" when you don't already have a gym habit, can instead be "Exercise regularly" with sub-bullets of what that could look like: "Go on regular walks", "Get a dumbbell set", "Find a channel on YouTube with workouts I like". Notice how I also moved these to be goals that are more within your control and easier to act on.

"Exercise Regularly" also doesn't limit how it gets done. Maybe you get invited to go mountain biking and find that you love it and regularly do it. Wouldn't that accomplish the goal still?

TREAT GOALS AS EXPERIMENTS

If you punish yourself at the end of every year because you "failed" your goals, regardless of whether they really should have been completed or not, are you actually going to continue setting goals to get to the life you want?
Some goals are just about trying something new. What if it wasn't quite what you were hoping for but triggered some other ideas and directions?

Maybe you feel like you were meant to be a sculpture because you've been told your whole life how good you are at it? You signed up for a pottery studio, went to a few sessions, but found that it just wasn't your vibe? You find yourself prioritizing other things and can't make the sessions. Why are you continuing to beat yourself up about that? You tried it, and it didn't work out. Maybe it's just not the right time, or maybe, since you seem to prioritize other things, it isn't meant to be. That's fine, you tried it, now's the chance to see why it didn't fit.
We learn more from the things that didn't work than the ones that did. Science and life are messy.

CONSTRAINTS ARE DESIGN INPUTS

Up until now, this has probably felt like you can and should ignore everything going on in your life to put down goals to live in Bali. Unfortunately, life doesn't work that way. We still need to live, and people depend on us today. You can't ignore your kids' dance recital because it doesn't align with you watching the pool boy while sipping pina coladas.

Treat constraints as inputs to the goal, not obstacles. That is, if you have kids' sports games 6 days a week, how can you adjust your life to ensure you still get time for you? Maybe you start splitting time with your partner to take the kids to their games 3/6 days. Working nonstop and feeling like you couldn't possibly have the energy for anything else (I see you)? What will truly happen if you start getting some of your life back and setting some firmer boundaries?

If you don't take your current life's constraints into account while working through these goals, you're guaranteed not to complete them and have a high-friction year. A good plan fits the life you actually have. It doesn't mean you can't change the life you live, but don't expect more than a few minor tweaks.

Also, the contraints you had last year, likely won't be the same the next year. Heck, the constraints you had in the first half of the year are going to be different from the 2nd half. This is partly why we revisit goals to see what needs to pivot.

CONSTRAINT VS INFLUENCE

There's an important point to make here. Constraints should be within your control. Don't work a goal around someone else doing something. If that person doesn't finish, or what they did isn't what you needed, how are you going to accomplish what you need to do?

Don't put a goal around going on a trip once that project is done at work. What happens when work pivots you to a different project? Or the project stalls entirely? Are you not going to go on that trip?

ACCOUNTABILITY WITHOUT PRESSURE

How are you being held accountable for these goals? Remember, these are your goals. Not what your job thinks you should do; these are what you want to do, so don't expect your boss to help out here.

Only you know what truly drives you. The best I've found is being open and honest with your friends and partner about these goals, and encouraging them to go on their own journey. As you chat throughout the year, you can bring up how things are going or realizations you've had about the goals. Maybe it's that a goal you thought was so important turned out to be pretty trivial, or how you did something that moved the needle a bit. This keeps the pressure off, but also should encourage open and honest conversation to keep you moving forward. Hopefully, they also ask questions that help provide different perspectives.

CHECK-INS AS ONGOING REFLECTION (NOT ANNUAL EVENTS)

If you've waited a year to look over your progress, you've missed the mark. I can't imagine anyone's life being so stable that what was planned 365 days prior still applies as written. Hopefully, you are seeing these goals so often that you think about them as you're driving to your dentist appointment, or changing out of your work clothes and deciding to put on workout clothes instead of PJs because the list of them is right there.

We don't climb ladders by starting at the bottom rung and somehow leaping to the top. It's one small rung at a time to eventually get there. True growth is the same; we don't set something, do it once, then expect to have actually progressed several months later. Review where you are at intentionally. Spare 30 minutes every few weeks and walk through each goal. Does it still feel right? How's it looking to actually do it?

USING THIS AT WORK (REVIEWS, GROWTH, COMPENSATION)

Everything we've discussed so far has leaned on setting goals to be true, authentic, and transparent to yourself. Guess what... This also applies to work. The format is likely different depending on the company, but the principles still apply.

Work goals shouldn't be the opposite of where you want your life to go. That doesn't mean your job has to perfectly match your personal vision, but it does mean you should be intentional about how they interact.

Again, do the exercise. Start by jotting down all your work-related ideas for goals, and come up with themes. Now, compare those themes against your personal goals. Do they support each other or conflict? Can they be modified to better align with your own values while still progressing at work? Are you factoring in your personal goals as constraints in your work goals?

For example, a promotion might move you closer to your long-term goals by increasing stability or income, but it also might push you further away from them by consuming bandwidth you need for your personal priorities. Neither is inherently right or wrong. The important part is recognizing the trade-off and choosing intentionally.

Once you're clear on alignment, formatting them into whatever system your job requires is the easy part; it's ensuring you aren't sacrificing yourself because of external and social pressure that is the hard part.

If you're self-employed, the lines are blurrier. Put yourself in the shoes of your business, and do the same exercise. For me, I blend the goals as I blend my life and my business. I have some specifically catered towards growing my business, and the rest are about growing myself, but neither conflict with the other.

WHERE TO PUT YOUR GOALS

Don't stress about making a ton of goals. If you've never really set personal yearly goals before, start small. You need to build habits and figure out what works for you to try them out. Where are you putting these goals? Sticky notes that'll get lost in the clutter on your desk? A new journal you bought just for this? Will that journal ever actually get taken out? A note on your phone? Make these things visible. I make a quick image in canva with my goals and themes, print it out, and put it above my hat rack in my closet. I don't stare at it daily, but fairly regularly. I also keep a pen handy to update that paper with quick notes or updates for that paper. I also keep track of my goals in my project management tool I use daily, ClickUp. It gets lost among the numerous projects, notes, docs, etc., in there, but it does allow me to keep a bit more detail and notes against those goals.

Tack them onto something else you already do. Hoping you start some new habit you've never done before, solely for these goals, likely won't stick (ahem, gym memberships). Where do you keep track of your current to-dos? What's something you already routinely do daily or weekly? Put these with those.

A STEP-BY-STEP SUMMARY

Step 1: Define and Anchor to the Long View
Answer this question: "What does my ideal life look like in 10 years?" You're setting the direction here, not predicting the future.

Step 2: Name The Themes
Define your themes for the next year and make sure they help you move toward that long view.

Step 3: Set Directional Goals (Not Tasks)
For each theme, ask: "What direction do I want to move in this year?"

Step 4: Identify (And Be Honest About) Constraints
What real constraints do I need to consider to be able to accomplish these goals?

Step 5: Choose a Few Experiments
Treat goals as experiments, not promises. Try the things, learn from them, but don't punish yourself if it's not a fit.

Step 6: Decide where this lives
Find a place where you will regularly see your goals. Whenever possible, try to attach them to habits you already have.

Step 7: Define What "A Good Year" Feels Like
At the end of the year, what will make you feel good if you live this way?

THIS IS A PRACTICE, NOT A PERFORMANCE

It's not about getting it right; it's about being honest with yourself, paying attention, being intentional with the life you want to live, and making small adjustments as things change. You're doing this for you. You'll find what does and doesn't work for you over time. How you write goals, which ones seem to stick more than others, and what actually motivates you only comes with practice and reflection.

Revisit this when something feels off, and update your goals when priorities shift. Let it be dynamic and live and change as you do.

If you try any of this and have thoughts, feedback, or tweaks that worked well for you, I'd genuinely love to hear them!

Please shoot me an email (hello@trevorfry.tech), or yell at me on LinkedIn.