



Annual Goal Planner™

An undated system for choosing what matters and turning it into steady progress.

YEAR _____

MY WORD FOR THE YEAR _____

DEFINE YOUR DIRECTION

The Year I Want to Create

At the end of this year, I want to be able to say _____

I want this year to feel like _____

AREA	MY INTENTION
Work / purpose	
Health / energy	
Relationships / community	

WHAT MATTERS MOST

My Three Guiding Principles

1. _____
2. _____
3. _____

The one thing I will protect

START WHERE YOU ARE

Life-Area Review

Score each area honestly, then identify the change that would matter most.

LIFE AREA	NOW /10	WHAT IS WORKING	WHAT NEEDS ATTENTION
Health & energy	—		
Work & purpose	—		
Money	—		
Relationships	—		
Home & environment	—		
Learning & growth	—		
Fun & creativity	—		
Contribution	—		

Patterns I notice

The area that deserves focused attention

Area

Why now

CHOOSE LESS, FINISH MORE

My Five Goals

Five meaningful outcomes are enough. Each goal needs a clear result and a reason.

#	GOAL / OUTCOME	WHY IT MATTERS	SUCCESS MEASURE	TARGET
1				
2				
3				
4				
5				

Priority test

☐ Aligned	Does each goal support the year I want to create?
☐ Specific	Can I tell clearly when the goal is complete?
☐ Realistic	Can these goals coexist with my time, energy and responsibilities?
☐ Meaningful	Would progress still matter if nobody else saw it?

My lead goal

The goal that will make the greatest positive difference _____

TURN OUTCOMES INTO PLANS

Goal Plans 1–3

Define the finish line, milestones and the next visible action.

GOAL 1 _____

Why this matters	
Success looks like	
Three milestones	1. _____ 2. _____ 3. _____
Next action	

GOAL 2 _____

Why this matters	
Success looks like	
Three milestones	1. _____ 2. _____ 3. _____
Next action	

GOAL 3 _____

Why this matters	
Success looks like	
Three milestones	1. _____ 2. _____ 3. _____
Next action	

PLAN FOR REALITY

Goal Plans 4–5

Make the path practical and decide how you will respond when momentum dips.

GOAL 4 _____

Why this matters	
Success looks like	
Three milestones	1. _____ 2. _____ 3. _____
Next action	

GOAL 5 _____

Why this matters	
Success looks like	
Three milestones	1. _____ 2. _____ 3. _____
Next action	

Obstacle plan

LIKELY OBSTACLE	EARLY WARNING SIGN	MY RESPONSE

WORK IN SEASONS

Quarterly Roadmap

Give every quarter a small number of outcomes and a clear review point.

Q	QUARTER THEME	KEY OUTCOMES	MILESTONES	REVIEW / ADJUST
Q1				
Q2				
Q3				
Q4				

Quarterly review questions

What moved forward? _____

What is no longer important? _____

What needs a different approach? _____

What will I commit to next? _____

SEE THE WHOLE YEAR

12-Month Milestone Map

Assign milestones, not entire goals. Keep capacity for life, recovery and change.

MONTH	MAIN MILESTONE	KEY DATES / EVENTS	CAPACITY NOTE
JAN			
FEB			
MAR			
APR			
MAY			
JUN			
JUL			
AUG			
SEP			
OCT			
NOV			
DEC			

MAKE PROGRESS EASIER

Habits, Support & Accountability

Design the conditions that help you continue when motivation changes.

Habits that support my goals

HABIT	FREQUENCY	TRIGGER / CUE	HOW I WILL TRACK IT

Support system

SUPPORT	PERSON / TOOL	HOW I WILL USE IT
Accountability		
Knowledge		
Practical help		
Encouragement		

My reset plan

When I fall behind, I will

The smallest useful action is

I will review my goals every

CLOSE THE YEAR WELL

Year-End Review

Celebrate honestly, learn without judgment and choose what to carry forward.

My five proudest moments

1.
2.
3.
4.
5.

Goal outcomes

#	GOAL	RESULT / %	WHAT I LEARNED
1			
2			
3			
4			
5			

Reflection

What changed in me this year?

What will I release?

What will I carry forward?

YEAR SCORE / 10	NEXT YEAR'S FIRST IDEA
-----------------------------	------------------------------------

The future isn't something you wait for. It's something you build.