

# ELEVATE

BY: VALKYRIE INVESTMENTS

Month 2:

## GOAL SETTING

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February, 2022

# START HERE

## Intrinsic vs. Extrinsic Goals

You've probably noticed by now that goal setting is having a moment. Everywhere you look, there's #goals. And it's very common these days for someone (and maybe this someone was you) to say, "Hmmm... I should set some goals," and then proceed to open up a magazine, or scroll Instagram, or check out the tabloids to see what the rich and famous people are up to.

And that's the most common starting point for setting goals:

have *that* body,

drive *that* car,

have *that* job,

date *that* person,

visit *that* resort in Bali.

But those are all extrinsic goals.

### WHAT DO EXTRINSIC GOALS LOOK LIKE?

*"We buy things we don't need with money we don't have to impress people we don't like."*

**Extrinsic goals are defined by external factors such as the positive evaluation of others.**

Most extrinsic goals orbit around the themes of fame, money, image, and conformity. Extrinsic goals are everywhere because our culture is set up to get you to buy things, but the problem with setting and working toward extrinsic goals is that you either (1) won't achieve it because you'll lose interest and enthusiasm for it (surprise, achieving any goal is hard) or...

(2) you'll achieve it and it will feel hollow and you'll wonder why it wasn't satisfying.

Setting extrinsic goals is a sure fire way to set your goal setting up for failure.

Instead, what we're doing today is setting intrinsic goals.

**Intrinsic goals are rooted in what is inherently satisfying to you.**

Intrinsic goals tend to be more motivating over the long term and more fulfilling once accomplished, because you know *why* you set the goal in the first place.

To identify what would be intrinsically motivating to you, it's going to take a little work on the front end.



**Any initial thoughts or reactions to that?**

# THE CIRCLE

One of the reasons goal setting may have felt overwhelming in the past is because **you may have jumped right into attempting to set detailed goals without actually knowing what you want.**

Our first exercise is called The Circle (next page), and it's a brainstorming activity that is meant to set the stage for creating goals by helping you identify two things:

(1) what you want in your life and (2) what you don't want in your life.

I like to use the metaphor of an airplane flight. The Circle is your view from 30,000 feet. Big picture stuff. Think broad horizons, possibility, white fluffy clouds and a beautiful landscape that stretches for miles.

Set a timer for 5 minutes, and right now I want you to focus only on what's inside your circle—what you want. Write words, phrases, you can draw little pictures if you want. Also these can be abstract ideas (like love, laughter, connection) or concrete ideas (like a Great Dane puppy or a cabin in the Rocky Mountains).

If you're doing this exercise in a group, it's particularly beneficial to share this process out loud. If someone says something you like, write it in your circle too! The person next to you who said "great sleep" didn't invent the concept of great sleep. If you want great sleep too, write it in your circle.

Okay now it's time to focus on the outside of the circle—what you **don't** want. Same rules. Five minutes.

It's time to move on from The Circle, but I want to make sure and remind you (especially if this is your first time setting goals) that **you are just getting started**. There is no way that you can figure out everything you want in your life in 10 minutes on a Tuesday afternoon. We're opening doors in your brain that perhaps have been closed for a very long time. You will probably be falling asleep in your bed tonight and your eyes will snap open with something you should have written in your circle. So print these sheets of paper out and leave them out on your breakfast table or nightstand. Let this be a living document in your life over the course of the next few days.

# THE CIRCLE

In order to work toward something, you have to know what you want! Use this simple brainstorming exercise to get clear. Place words and phrases that represent **what you want in life inside the circle**. Place **what you don't want outside the circle**.

**I DON'T WANT...**

**I WANT...**



# WHEEL OF LIFE

Success means different things to different people. What's important for someone else may not be as important for you. For your goals to be intrinsic, your next step is to define what success looks like to you by using words, habits, phrases, etc.

You're answering the question, "How will I know I've been successful in this area?" Write your statements in the corresponding area of your wheel of life. Some examples might be: reading lots of books, getting enough sleep, a consistent yoga practice, involvement in a small group, etc.

What you write can have as much or as little detail as you want. Hint: don't feel like you need to come up with a bunch of new stuff; you already started doing this work by brainstorming in The Circle. So take a look at what you wrote in your Circle and start to flesh some of those things out.

Using the metaphor of the airplane trip, you're dialing in your navigation now, getting a solid grasp on where your destination is.

There's no wrong way to do it. If you want to drill down and just work on one slice at a time, feel free. If you want to bounce around and write wherever you feel inspired, that's great too.

Set a timer for five minutes and get started defining success!

Optional Self-Inventory:

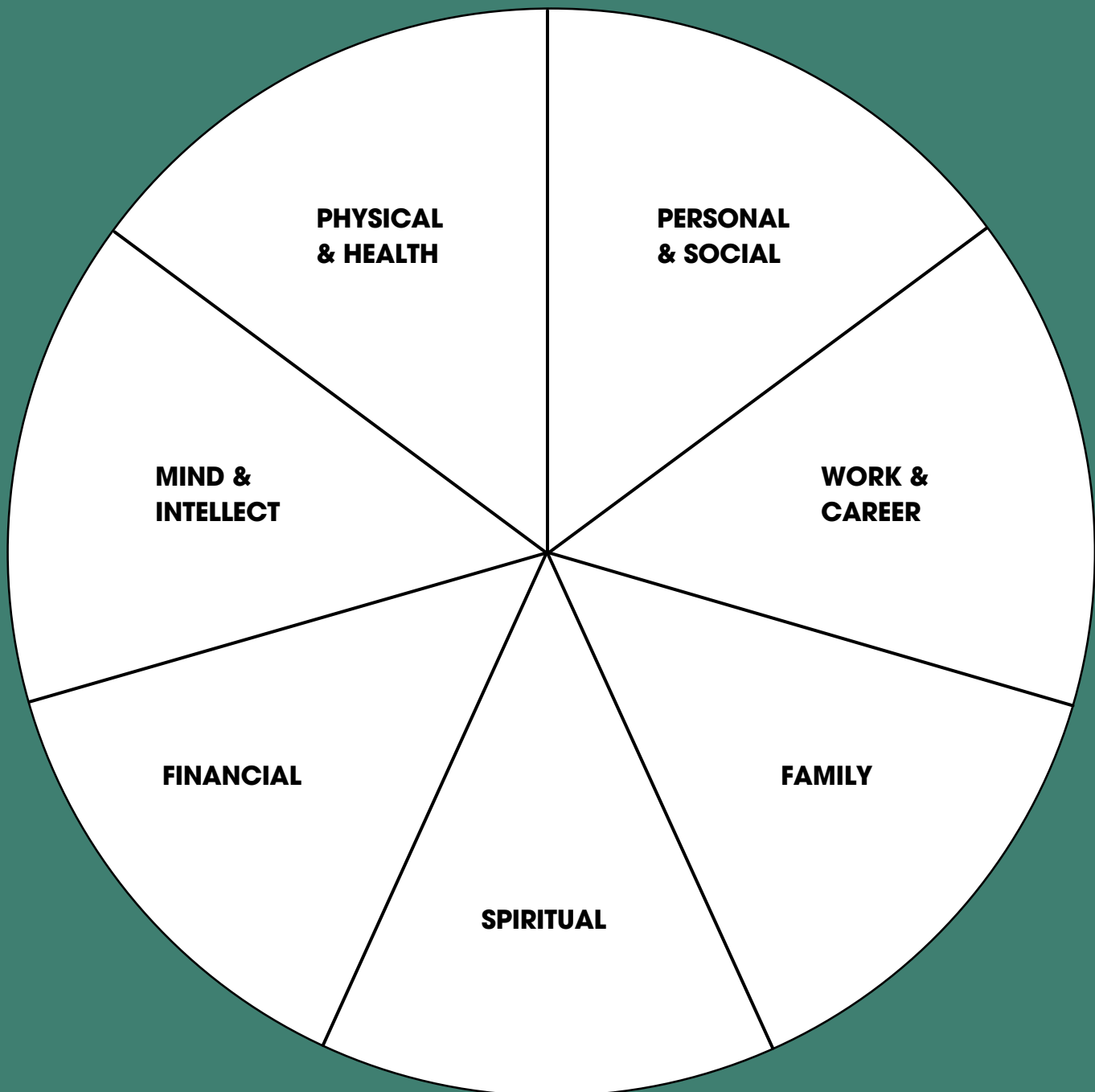
Once you're done defining what success looks like in each spoke of your wheel, ask yourself how you're doing now in each of those areas. Give yourself a letter grade (A, B, C, D, F) for each spoke.

## GOING DEEPER: THE HISTORY OF THE WHEEL OF LIFE

*The concept of the Wheel of Life was introduced by Zig Ziglar, in his book Born to Win. Organizing the areas of life into a wheel acknowledges that they're all important and interconnected, so if one area is out of alignment, it puts strain on the others. As you consider what success looks like in the seven areas, and later set goals in those areas, remember that achieving success in one area might require temporary or long-term changes to another area. If success in my Personal/Social area means I travel more, it will likely affect my Financial and even Work/Career realities. If I set a goal to work out more (Physical & Health), it might require sacrifices in my Family or Social life.*

# WHEEL OF LIFE

Success means different things to different people. What's important for someone else may not be as important for you. For your goals to be intrinsic, your next step is to define what success looks like to you by using words, habits, phrases, etc. You're answering the question, **"How will I know I've been successful in this area?"** Write your statements in the corresponding area of your wheel of life. Some examples might be: reading lots of books, getting enough sleep, a consistent yoga practice, involvement in a small group, etc.



# IDENTIFY YOUR CORE VALUES

## BEFORE WE BEGIN: 1-MINUTE MEDITATION

*Close your eyes and take three deep breaths. Picture a person you admire. It can be someone you know very well or someone you've never met. Someone who you see regularly or someone who has passed on. What do you admire about them? Picture them doing or saying or being that thing. What have they taught you? What would you like to learn from them? What would you like to thank them for? Write that person's name down on a blank space on your paper. Now close your eyes again and think of another person you admire. (same instructions) Write that person's name. One last time close your eyes and think of a third person you admire. (same instructions) Write that person's name.*

Look at the names you wrote down. It's likely that you admire them because they embody core values that are meaningful to you. What do you admire about them?

We begin our Core Values exercise by thinking about people we admire because it's easy to understand values when we picture the people who live them out and the habits associated with them. If the person you admire is an excellent mom or dad, they likely embody the value of **Family**. If the person you admire is a central pillar of your community who makes everyone feel welcome and known and loved, they likely embody the value of **Community**.

## VALUES ARE THE CORE OF GOAL SETTING.

In order to set and work toward goals that matter, it is critical to know your personal core values.

Values are essential because they define what it is that you want out of life, and how you are going to behave to get it. Everyone has core values, whether they are aware of it or not. Our values help us make difficult decisions and guide how we spend our primary resources (time & money). Abraham Maslow, creator of the Hierarchy of Needs model, stated that self-actualization is defined as the achievement of one's uniquely defined values.

Back to the airplane metaphor, your values are your destination. They are your North Star and the horizon you are chasing.



The 21 core values listed on the next page were developed as part of a 30-year study called the Values Arrangement List (VAL) Survey. Obviously, there are way more than 21 values in this world (there are hundreds!), but the words printed on your paper should be considered categorical. For example, "power" could comprise many other values such as authority, control, influence, leadership, strength and so forth. If one of the words in bold doesn't quite capture your value, write down another word that does. For example, discipline is one of my values, but it's not on this list. Words mean different things to different people, but these are your values, so choose words that are meaningful for you.

Take a first read through the list of values and check the boxes for the values that stand out to you.

Then start to narrow down your list to 4-5 core values. Then rank them on the lines at the bottom of the page from 1-5.

### **HAVING TROUBLE? TRY PUTTING THE VALUES IN CONFLICT**

As you're narrowing down your list of values and ranking them, it can be helpful to imagine a scenario where two of your values are in conflict with one another. For example, if Family and Adventure are both values of yours, imagine a scenario where you're given the opportunity to move away from your loving and tightly knit family for a five-year contract as a sailboat captain, charting currents in the South Pacific. Does family or adventure win out?

### **REMEMBER: THESE ARE YOUR VALUES TODAY**

The result of this exercise reflects the importance you place on these values today. Don't create a values list that reflects the way you wish you were. It is likely that your values and value system will change as you evolve and become more conscious of what is really important to you. New life experiences, the natural maturation process, and major life events both good and bad, often cause individuals to rethink their life's priorities. I encourage you to revisit this exercise periodically, with an open mind to change.

### **OPTIONAL ADDITIONAL QUESTIONS**

- Look at your list of top 5 values and decide if there's something missing. Is there a value you wish was on your list? Stoic philosophers such as Aristotle taught that we become what we repeatedly do. If I want to become more generous, I should do generous things until it becomes a habit. If I want to become truthful, I should meticulously practice telling the truth until I have a keen sense of honesty. These are known as "aspirational values." Select one aspirational value and add it to your list, as something you would like to cultivate through your goals.
- Have participants share their #1 core value. Write everyone's core values on the board. In what ways do you see your #1 core value show up in your life at present?
- On a scale of 1-6 (1 being never, 6 being all the time), how do your current life choices move you toward



# IDENTIFY YOUR CORE VALUES



Read through the list of values and check the boxes next to the values that stand out to you. Once you have selected all the values that resonate with you, narrow the list down to 4-5 core values, then rank them 1-5 on the lines below.

- **Achievement:** attainment of goals and aspirations
- **Adventure:** pursuing excitement and taking risks
- **Aesthetics:** appreciation and enjoyment of the arts
- **Community:** activity in social or citizen groups
- **Equality:** justice and fair treatment for all
- **Fame:** being recognized and known for your contributions
- **Family:** close relations and support of loved ones
- **Freedom:** independence in thought and lifestyle
- **Fellowship:** having important relationships with friends
- **Happiness:** satisfaction, joy and contentment
- **Health:** soundness of body and mind
- **Love:** intimacy, devotion and warmth
- **Nature:** respect for animals and the environment
- **Peace:** enduring harmony and freedom from violence
- **Pleasure:** entertainment, relaxation and fun
- **Power:** authority, control and influence
- **Self-worth:** high regard for oneself and others
- **Social Service:** contributing to the welfare of others
- **Spirituality:** at one with God; religious beliefs
- **Wealth:** affluence, ease, and prosperity
- **Wisdom:** insight, knowledge and understanding

# WRITE YOUR TEN- YEAR VISION

## FIND SOME WRITING PAPER

*This can be the space provided on the next page or a page in your journal. The next step is to write your ten-year vision.*

## A VISION IS A STATEMENT OF YOUR IDEALS.

Organizations have vision statements. Every leader has to have a vision. Now, so will you.

But don't stress! The work you've completed so far (The Circle, Defining Success, Core Values) has primed you to write your ten-year vision.

## DATE AND AGE

Before we begin, start by writing the date, ten years from today, and your age. "It is \_\_\_\_\_. I am \_\_\_\_\_ years old." This starts by abruptly bringing the future into present terms. WHOA. Yes, you WILL be that age some day.

## FORMATTING

- You might like to write your vision like a journal entry, starting with the details of the scene you experience the moment you wake up.
- You might want to write bullet points, even phrases, briefly explaining with some detail and some broad strokes, what your present (in the future) life is like.
- You might try making this a series of statements. "I am \_\_\_\_\_. I choose \_\_\_\_\_. I love \_\_\_\_\_. I stand for \_\_\_\_\_."
- As long as you keep your content in the present, using now language, you're doing it right. Write as much or as little as you want. You'll know when it's done.

## VISION CREATION PROMPT (NEXT PAGE)



# VISION CREATION PROMPT



Read through the following as you begin to gain a clear picture of your vision for your life 10 years from now. You may have specific answers to some of the questions, and some might simply be food for thought. Journal your thoughts.

- Imagine your life 10 years from today.
- That's 520 weeks from now or 3650 days.
- You are proud of who you have become and the work you've put in to get here.
- You are grateful for the circumstances in your life and the lessons you've learned along the way.
- As you survey your surroundings, you notice that everything in your life—your relationships, your habits, the way you spend your time and money—it all lines up with what you value most.
- Where do you live?
- Who is there with you?
- How do you spend your time?
- Where does your fulfillment come from?
- What are your rest and activity patterns?
- How do you eat and drink and care for yourself?
- How do you spend your time?
- How do you spend your money?
- How do you fill your day with meaning?
- How have you pursue education and training?
- How do you pursue challenge?
- How do you give back to your community?
- How do you refuel yourself?
- How do you cultivate intimacy and trust in your primary relationships?
- Who are you learning from? Who are you teaching?
- What are you most proud of?
- What are you most looking forward to?

# WRITE YOUR GOALS

Look back over your *Circle, Wheel of Life, Values list, and Vision*, and try turning what you wrote there into some goals. Use the following formatting criteria to guide you in setting goals that matter.

## SMARTWAP

It's time to write goals that are Specific, Measurable, Achievable, Relevant, Time-Oriented, Written, Approach, and Present.

### SPECIFIC

Your goals should have detail to them. The more detailed, the greater the likelihood that you'll work to achieve them, because you will know exactly what you need to do to make it happen.

The more specific you can make it the better.

NO: I run more.

YES: I run 20 miles every week of June, July, and August.

NO: I organize my closet by the end of the summer.

YES: I get rid of 50 articles of clothing, color-code my hanging clothing, and fold all my pants and shirts using the KonMari method by the end of the summer.

### MEASURABLE

Your goal should be "check-off-able." I even go so far as to write an actual box to check in front of all my goals.

You should know when it's done so you know when to celebrate!

One way to do this is by identifying the core value behind the goal and then identifying an actionable indicator that corresponds with that value. Do you want more health in your life?

Identify practices that are indicators of health, such as eating, sleeping, and exercising habits.

NO: Make more friends this year.

YES: I eat lunch with someone I've never had lunch with once every month this year.

NO: Get fitter by September 15th.

YES: I run a mile in 7:00 by September 15th.

NO: Learn Italian by the end of 2022.

YES: I memorize flash cards of 200 Italian words by the end of 2022.

## ACHIEVABLE (OR ATTAINABLE)

It should be possible for you. Only you can decide this. Given your resources (time and money), set goals that are challenging but possible.

When you read your goals, they should make your heart beat fast, not fill you with dread. Another key to remember here is to try to set goals that have to do with your action, not someone else's.

Another way to say this is to set **input goals**, **not outcome goals**. For example, it can feel disempowering to put a "get married by next June" goal on your board, when it feels like there are a lot of factors that are out of your hands. Instead, identify steps you are in control of, such as setting up an online dating account, enrolling your friends in introducing you to their single friends, going to therapy to work on becoming the healthiest emotionally you can be, or attending (or starting!) a singles group at your church.

*A quick note on achievability: people tend to shoot too high on their short-term goals and too low on their long-term goals.*

NO: I am married by 2026.

YES: I create an online dating profile by July 31.

NO: I am at my goal weight by the end of next month.

YES: I attend 20 workout classes by the end of next month.

NO: I am a NASA astronaut by December 2022.

YES: I attend Space Camp by December 2022.



## RELEVANT

They should be your goals—not your doctor's goals, not my goals, not your mom's goals—your goals. This is why the core values conversation is so important.

When you identify your core values, you are identifying your belief system. If you want to set goals that inspire you to work toward with wild abandon, they have to lead in the direction of your core values.

## TIME-ORIENTED

Call it what you want: a deadline, a by-when. But your goals should have a time domain.

One way to do this is to set a specific date by which you want your goal to be accomplished.

Another way I like to do this is to pick a timeframe and set a goal to do a thing a certain number of times in that timeframe. I call these “chipper” goals, because you have to chip away at them. The idea here is that you find a way to tally up your progress as you make it over the course of a year.

I complete a half marathon by August 15, 2022.

I give away 300 possessions in 2023.

**... I decided somewhere along the way that SMART just isn't enough. Goals should also be:**

## WRITTEN

Accomplishing goals takes commitment and intentional action. **One of the ways you commit to your goals is by making them tangible: writing (or printing) them on real paper and hanging them somewhere you (and preferably people you live and work with) will see them often.** This is all about accountability.

What does this look like personally? I have a goals board in my kitchen, where my family, my guests, and I are always congregating. People read and ask me about my goals all the time, and I constantly have the opportunity to reinforce my goals (and remember why I started in the first place) in my conversations.

Use discretion. Obviously some goals are private. You don't have to post your annual income goal or you and your partners' baby-making goal for the world to see.

[www.valuesvisionandgoals.com](http://www.valuesvisionandgoals.com)

*“A growing number of studies have shown that people who chiefly pursue avoidant goals (or construe their goals in avoidance terms) are less happy, and more anxious, distressed, and unhealthy, than people who generally pursue approach goals.”*

**The How of Happiness,  
by Sonja Lyubomirsky**

## APPROACH

This is another subtle but powerful difference, based on the same principle that words create. Write approach goals, not avoidant goals; meaning goals that define what you move toward, not away from. **What you think about you move toward.** If I tell you not to think about elephants, what are you immediately going to think about? Elephants! The same is true with your goals.

If I write a goal that says, "I do not eat sugar after 6pm," then every time I walk past that goal on my goals board, what am I going to think about? Sugar! It's easy to turn that goal into an approach goal by re-writing it, "I eat only raw fruits and vegetables after 6pm."

This is all about hacking the psychology of motivation. It's relatively easy to identify a single path to accomplish an approach goal (do what the goal says: eat fruits and vegetables), but an avoidant goal has an infinite amount of ways to fail (all the various types of snacks!).

## PRESENT

This is subtle but powerful. If you believe (and by now you should) that words are powerful, you can start by leveraging that power in the way you write your goals.

Write your goals as though they are happening right now. How to do that? Remove the words "want to," "try to," or even "will" from your goal-setting vocabulary.

Why? If you write goals that take place in the future, you will always allow them to live in the future (even when the date technically rolls around on the calendar). But if you want your action to be here and now, your goals should be here and now.

Words create! Use them to create a sense of urgency.

NO: I do not eat sugar after 6pm.

YES: I eat only raw fruits and vegetables after 6pm.

NO: I want to run a marathon by August 31.

YES: I run a marathon by August 31.

NO: I will save \$3,000 by December 19th, for an international vacation next summer.

YES: I save \$3,000 by December 19th, for an international vacation next summer.

## NOW WHAT?

**Set a date in your calendar and to do this whole thing again in three to six months.**

# 2022 CALENDAR

**January**  
**GRATITUDE**

**February**  
**GOAL  
SETTING**

**March**  
**NUTRITION**

**April**  
**STRESS  
AWARENESS**

**May**  
**PHYSICAL  
FITNESS**

**June**  
**OUTDOORS**

**July**  
**SOCIAL  
WELLNESS**

**August**  
**HAPPINESS**

**September**  
**MEMORY**

**October**  
**EMOTIONAL  
WELLNESS**

**November**  
**ORGANIZATION**

**December**  
**GIVING**

Volunteer Idea: February is National Cancer Prevention Month. If you are able, consider volunteering via [cancer.org](https://cancer.org)

Thanks for joining us this month! Follow along for more.

[valkyrieinvest.com/elevate](https://valkyrieinvest.com/elevate)





CORE VALUES

'S GOALS

TODAY'S DATE: \_\_\_\_\_

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