



Goal Survival System:

A simple operating system to keep goals
alive beyond February.

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Why most goals fade

January goals don't fail for lack of ambition; they fail for lack of support. Goals tend to fade when outcomes are fuzzy, progress isn't visible, and there's no simple rhythm to keep attention on what matters. Rather than relying on motivation, this tool gives you a small operating system for your goals. It emphasizes clarity you can see, a cadence you can keep, and boundaries that protect your time when pressure rises.

What this workbook delivers

- **Clarity** you can see – one outcome, one weekly measure, one place it lives
- **Cadence** you can keep – a short weekly review and a monthly checkpoint
- **Constraints** that protect time – anti-goals and guardrails that prevent drift and overcommitment

How to run it

- Choose up to three Q1 goals. Fewer goals make better progress.
- Work through the pages in order (45–60 minutes total, or two shorter sessions).
- Put your weekly review on the calendar now – same day and time every week.

What you'll leave with

- Three goals with visible outcomes and weekly measures
- A 10-day launch plan to create momentum
- Anti-goals and guardrails that keep focus intact
- A weekly review sheet, monthly checkpoint, risks → protections map, and one-page dashboard

STEP 1: Quick Goal Draft (Use if goals aren't defined yet)

This section is intentionally rough. Its purpose is not precision, but momentum. If your goals are not yet finalized, use this page to sketch workable drafts so you can run the rest of the system without delay. If you already have drafted goals, you can skip this page and move directly to defining targets.

- **Outcome 1 (Q1):** _____
Weekly measure (simple/visible): _____
Owner: _____ Data source: _____
Risk → Protection (one each): _____ → _____
One tiny starter (≤30 min): _____
- **Outcome 2 (Q1):** _____
Weekly measure (simple/visible): _____
Owner: _____ Data source: _____
Risk → Protection (one each): _____ → _____
One tiny starter (≤30 min): _____
- **Outcome 3 (Q1):** _____
Weekly measure (simple/visible): _____
Owner: _____ Data source: _____
Risk → Protection (one each): _____ → _____
One tiny starter (≤30 min): _____



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Note: You can run the rest of this workbook using these drafts. When ready, formalize each as a SMARTER goal in your Holiday tool.

STEP 2: Devine the Target (Clarity)

Clarity lives where you can see it. A goal becomes operational when it has a clear outcome, a single weekly measure, and a visible home. This page removes ambiguity so progress does not depend on memory or interpretation.

Focus on precision, not elegance. If you cannot explain the goal in one sentence, it is not ready to run.

- **Goal 1**

Goal title: _____

Outcome (what changes and by when): _____

Weekly measure (simple/visible): _____

Where it lives (whiteboard/dashboard/notebook): _____

Owner (one accountable): _____

Data source (who/where): _____

- **Goal 2**

Goal title: _____

Outcome: _____

Weekly measure: _____

Where it lives: _____

Owner: _____

Data source: _____

- **Goal 3**

Goal title: _____

Outcome: _____

Weekly measure: _____

Where it lives: _____

Owner: _____

Data source: _____



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STEP 3: 10-Day Launch Plan (Momentum by Design)

Big goals rarely stall because they are wrong; they stall because the first steps are unclear or too large. The purpose of this 10-day launch plan is to create early traction while pressure is still low and attention is still available.

Think of these ten days as an intentional runway. You are confirming clarity, testing assumptions, and putting simple rhythms in place – before habits harden and calendars fill.

Days 1–3: Set the foundation

- Confirm outcome + weekly measure for each goal.
- Put them where you'll see them during the week.
- Schedule your weekly review (15 min, recurring) and monthly checkpoint (30–45 min).
- Name one risk → one protection per goal.

Risk → Protection (G1): _____ → _____

Risk → Protection (G2): _____ → _____

Risk → Protection (G3): _____ → _____

Days 4–7: Create visible progress

- Complete three tiny starters (≤30 minutes each) per goal.
- Choose actions you can finish and show.

Starters (G1): • _____ • _____ • _____

Starters (G2): • _____ • _____ • _____

Starters (G3): • _____ • _____ • _____

Days 8–10: Align people and data

- Share each goal with the right stakeholders.
- Confirm owner, contributors, and data source.
- Set the first checkpoint date and topic.

Stakeholders (G1): _____

First checkpoint (G1): _____ / Review: _____

Stakeholders (G2): _____

First checkpoint (G2): _____ / Review: _____

Stakeholders (G3): _____

First checkpoint (G3): _____ / Review: _____

If you drafted goals on Page 2, treat Days 1–3 as your refinement window before you scale.

STEP 4: Anti-Goals (The “Not This Quarter” List)

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Anti-goals make trade-offs explicit. They define what you are *not* doing so your capacity is not quietly consumed by good ideas and competing priorities.

This list is not permanent. It exists to protect focus for this quarter.

Examples (customize to fit):

- No new initiatives without retiring one that's finished or failing.
- Max two standing meetings per week per goal.
- No scope changes after the monthly checkpoint without a revised date.
- No "gold-plating" beyond agreed scope or specification.

Your anti-goals (3–5):

STEP 5: Guardrails (Operating Boundaries)

Guardrails prevent predictable drift. They define how work will be done when pressure increases, decisions multiply, and shortcuts become tempting.

Choose only a few. Guardrails work because they are remembered and honored, not because they are comprehensive.

Choose 3–5 guardrails (examples below; customize your own):

Time guardrail: _____

Quality guardrail: _____

Ownership guardrail: _____

Stop condition: _____

Communication guardrail: _____

(Additional/custom): _____



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STEP 6: Weekly Review (15 Minutes)

This is the habit that keeps goals alive. The review is short by design so it remains sustainable during busy weeks. Treat it like a client meeting: brief, consistent, and protected.

The purpose is awareness and adjustment, not explanation.

- **Goal 1**

What moved? (update the measure): _____

What's next? (one concrete action this week): _____

What's protected? (guardrail check/fix): _____

- **Goal 2**

What moved? _____

What's next? _____

What's protected? _____

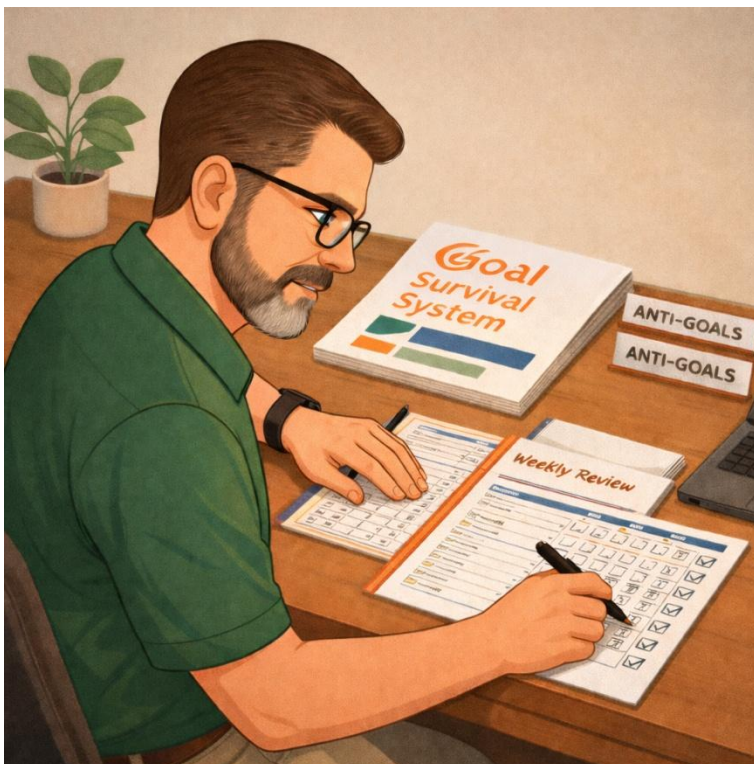
- **Goal 3**

What moved? _____

What's next? _____

What's protected? _____

Next review (date/time): _____ *(Put it on your calendar now.)*





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STEP 7: Monthly Checkpoint (30–45 Minutes)

The monthly checkpoint is where you course-correct deliberately. It is the moment to reduce scope, retire finished goals, and double down where evidence supports progress.

Focus on causes, not symptoms.

- On track / off track? Why (cause, not symptom):

G1: _____

G2: _____

G3: _____

- Scope adjust (reduce, defer, clarify):

G1: _____

G2: _____

G3: _____

- Risks seen → new protections:

G1: _____ → _____

G2: _____ → _____

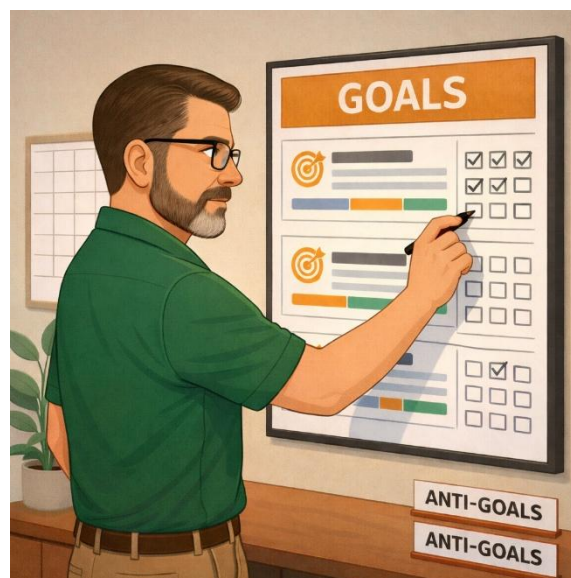
G3: _____ → _____

- Retire (complete) / Double-down (next month):

G1: Retire _____ / Double-down _____

G2: Retire _____ / Double-down _____

G3: Retire _____ / Double-down _____



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STEP 8: What I Choose to Lay Down (Release)

Most goals fail in predictable ways. This page captures those risks once, then pairs them with protections so you are not solving the same problems repeatedly.

Keep this page visible.

• **Goal 1**

Risk: _____ → Protection: _____

Risk: _____ → Protection: _____

Risk: _____ → Protection: _____

• **Goal 2**

Risk: _____ → Protection: _____

Risk: _____ → Protection: _____

Risk: _____ → Protection: _____

• **Goal 3**

Risk: _____ → Protection: _____

Risk: _____ → Protection: _____

Risk: _____ → Protection: _____

STEP 9: One-Page Visibility Dashboard (Snapshot)

What's visible gets managed. This dashboard is not for explanation; it is for awareness. Keep it simple and update it consistently.

Goal	Outcome	This Week's Measure	Trend (↑ → ↓)	Next Action	Guardrail Kept (Y/N)
G1					
G2					
G3					



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STEP 10: Team Alignment (Optional Share-Out)

Simple visibility invites support without micromanagement. Use this page to align others without reopening decisions or over-explaining.

One-sentence alignment note:

"Top three Q1 goals are _____.

We'll track _____ weekly and begin with _____ this week."

Owners / touchpoints / data source:

G1 owner: _____ Touchpoints: _____ Data: _____

G2 owner: _____ Touchpoints: _____ Data: _____

G3 owner: _____ Touchpoints: _____ Data: _____

Close & Commit

You've built a system that supports progress: clear targets, small starters, a weekly pulse, and boundaries that protect your time. The value of this tool comes from running it, not perfecting it.

Keep it visible. Keep it simple. Keep going.

Date: _____ **Signature:** _____

Reminder:

If you drafted outcomes on Page 2, open your Holiday SMARTER tool now and formalize each goal using the outcome, weekly measure, cadence, and protections you established here.

Bridge & Hand-Off Notes

- Used Step 1 to set your goals? Convert the drafts into SMARTER goals after your first weekly review. The SMARTER Goals worksheet can be found as an appendix to this tool.
- Already have SMARTER goals? This workbook is your operating rhythm – run it every week.

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SMARTER Goals set you up for success! When your goals are clear and you know exactly what you're working towards it's easier to get started, make action plans, see your progress and succeed!

INSTRUCTIONS: Follow the steps below to learn about SMARTER goals – and begin to develop a goal of your own. Then turn over to page 2 to write out your finished SMARTER Goal, identify 3 actions to get started, plus see a SMARTER Goals example.

What do you want to set a goal around?



SPECIFIC *Have you ever struggled to get started because your goal is too fuzzy? Well, the more specific you are, the easier your goal is to start, work towards & achieve. Get clear here! Ask yourself: What are the outcomes I'm looking for? What results do I want? Then: Write out your goal (what you want) below, and make it as SPECIFIC as you can:*



MEASURABLE *A measure lets you know you've achieved your goal, and also enables you to track your progress. How would you prove your goal is complete? This points to your measure. It could be a financial amount, a count, percentage or some other measure. Rewrite your goal to include a MEASURE—or how you would PROVE your success:*



ACHIEVABLE *goals are within your control. This means you are able to make it happen (even if you need help to get there). For example, "winning the lottery" is not 'Achievable' as you do not have agency—the power—to make this goal happen. List some of the skills and resources you possess to be able to achieve this goal:*



RELEVANT *How important is this goal for you? Is it relevant to your values? Does it move your business forward? Does it move you towards your purpose? Rewrite your goal, ensuring it is RELEVANT:*



TIME-BOUND *goals motivate us, giving us a date to aim at and plan towards. Is there a specific date you're aiming at? If not, what might be reasonable? Consider your lifestyle, other responsibilities and life events that could get in the way. By when would you like to complete your goal?*



EVALUATE *What are the milestones for achieving this goal? How can you evaluate your progress to get better results? Rewrite your goal to include how you will EVALUATE your progress:*



REWARD *How will you recognize progress as you work towards achieving this goal? How will you celebrate successful completion of the goal? Rewards help to build sustainable habits. List what you will do to REWARD yourself as you progress with your goal:*



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SMARTER Goals Worksheet EXAMPLE:



Starting goal: Sell more eBooks.

- **Specific** – Increase the revenue from my health eBook from \$10,000 to \$25,000.
- **Measurable** – Compare the revenue from the previous year with the revenue from this year.
- Is it **Achievable** and within your control? **3 Key Steps I can take include:**
 1. Create a new, more exciting front cover
 2. Create a marketing action plan e.g., asking 25 friends to read and review it on Amazon
 3. Increase the price from \$9.95 to \$12.95
- **Relevant** – Increasing the revenue from my health eBook from \$10,000 to \$25,000 supports my business model and allows me the opportunity to hire-out additional artwork to support the eBook.
- **Time-Bound** – I would like to complete this goal by: November 30th 2025.
- **Evaluate** – Check if sales increase after each **Key Step** and adjust the plan as necessary.
- **Reward** – Plan a celebration dinner with all of the participants (e.g., cover artist, friends who participate in my marketing, etc.) to commemorate the success of my eBook.

Final goal: Increase the revenue of my health eBook from \$10,000 to \$25,000 by November 30th 2025; evaluate each Key Step to adjust as needed; commemorate my success with a team dinner.

Before writing out the final version of your SMARTER Goal, read this final tip:

Great GOALS are stated in the POSITIVE: Why? Because we get what we focus on. Whenever we say "I want to stop biting my fingernails" our brain has to first build a picture of what you DON'T want - bitten fingernails - in order *not* to do it. So, it's good to build a picture of what you're working towards, rather than building a picture of what you don't want. Here are two examples:

- Use "I have healthy fingernails" rather than "I want to stop biting my nails"
- Use "I weigh 150lbs" rather than "I want to lose 20lbs"

Write your finished SMART Goal Here:

Review the previous page, and remember the final tip above, write out your newly SMARTER goal below.

My SMARTER Goal is to: _____

_____ **by:** _____ Day - Month - Year

To wrap up this worksheet, write out the first 3 Steps towards your SMARTER Goal below:

Action 1 _____ **by when** _____

Action 2 _____ **by when** _____

Action 3 _____ **by when** _____

FINALLY, remember that goals are there to INSPIRE you, not to beat yourself up with!
Any time your SMARTER goal feels genuinely too hard, and you find yourself switching off, STOP!
Revisit this worksheet and reset your goal - making it more "Achievable."