

First read <http://www.aaronsw.com/weblog/theoryofchange> to get the flavor of this exercise.

## Theory of Change (i.e. back Chaining and reverse planning)

*Useful for identifying crucial steps for your terminal goals. When you're finished with this exercise, you should be able to explain how what you're doing makes it (more) likely you'll achieve your high level goals.*

Before you get started, I recommend you do this exercise on a big piece of paper or mind mapping software. You can do it in a text file, but it will be easier to visualize the branches if you write it as a tree.

Consider your top 1-4 terminal goals. This is the “why do I care” reason that motivates you to do something. It’s going to look more like “I want humans to have good mental health” or “I want animals to not suffer on factory farms”.

What’s the very last step to make the terminal goal happen?

Ask yourself, “What would I need to have in place or do to make that step happen?”

Keep asking until you can say yes to **“Can I do that step tomorrow?”** (Seriously. At some point the answer to that question needs to be “yes”, or you won’t achieve it!)

If you discover an obstacle, that’s okay! Ask, **“How can I solve this?”** and/or **“How could I achieve my goal without it?”** It’s also fine if your step is to learn/explore/test!

Repeat for the new items you’ve generated: **“What would I need to have in place or do to make this step happen?”** and so on. Eventually you end up with a list of things you could actually do to achieve your goal.

Once you have that list, ask yourself for each step, **“Is this activity crucial? Could I complete the next step without doing it?”** If you could, consider cutting that step.

### Resources

- [“Humans are not automatically strategic”](#) – an article by Anna Salamon on LessWrong

## Forward Chaining

*Useful for evaluating activities you’re already doing and taking advantage of opportunities.*

Make a list with each of your goals for the next month (e.g. doing research, writing papers, putting on a conference). Add any tasks you put more than 10 work hours a week to (e.g. mentoring people, email, teaching).

For each goal, work forwards to why you ultimately care about that activity – **“Why is doing this activity good? What does it accomplish?”** Continue until you reach a terminal goal(s).

You might have multiple high level goals – that’s normal! If you do, ask **“If it only helped this goal, would I still want to do the activity?”** For every goal where the answer is yes, include that goal for the next step.

Once you have the terminal goals, back chain for those goals. Check if there are better actions you could be taking to reach those goals.

Then, ask yourself **“Are these activities crucial? If I do this step, will the next step become very likely to happen?”**

### **Resources**

If you want to answer **“Are there better/faster/easier activities I could be doing that would accomplish the same goals?”**, try [Goal Factoring](#).

*Thanks to Malcolm Ocean, whose work I adapted for these instructions. All work here represents my own views.*