

New Year's Reflection and Goal Setting

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Step 1 - Reflection: Values and Experiences

Values

1. List your personal values. These can be things like "family", "security", or "exploration" (or anything else that speaks to you!).
2. Order and prioritize these personal values into a top 10 list.

Values

Ordered Values

Passions

Topic of choice

You have been assigned to go research a topic and present it in a low-stakes capacity. This research is for you! You get to learn about and dig in to any topic you want. You are given unlimited time and budget to research it. What topic do you choose?

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Work of choice

You are once again given unlimited budget and time: now, it's to do any job/type of work that you want. It can be anything from gardener to consultant to freelance writer to senior director of marketing. What job do you choose?

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Post-work of choice

Career done! You are free from the burdens of seeking compensation. All your financial needs are met. What types of activities do you plan to do post-retirement?

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Current personal passions

Adding to the above, write down your current personal passions. List out 10-15 passions. These are things that personally interest you: anything from concepts like "Design" to specific things like "Sewing" or "Surfing". Anything at all! What interests you?

Passions		

Traits

You can use whatever method you prefer: personal introspection, personality tests, etc. You can include descriptive adjectives too, such as "empathetic" or "calculating" or you could just use the output from a personality test. Aim for 10 traits!

Starter list of traits			
Conscientious	Calm	Honest	Agreeable
Ambitious	Humorous	Neurotic	Self-confident
Cheerful	Clever	Humble	Courageous
Loyal	Open	Adventurous	Articulate
Creative	Curious	Disciplined	Extroverted
Friendly	Hardworking	Independent	Kind

Your traits	

Roles

Describe your present-day self through a series of adjectives or roles. When I say "present-day self", I include roles you seek for yourself! That is, it doesn't have to be exclusive to roles you currently fill. On the flip side, it can also include roles you want to drop in the future. Here are some example roles: husband, writer, traveler, manager, mentor.

For each role, note whether this is one that you hold now, one that you want in the future; one you want to continue, or one you want to get rid of. What roles do you see for yourself?

Role	Current or Future / Keep or Drop

Rewarding Experiences

Okay, last one for this section!

1. Create a list of at least 20 rewarding experiences from your life, going all the way back to childhood. The more experiences you can put in here, the better.
2. Categorize those experiences into broad categories. See what types of buckets naturally form as you sort through them.
3. Further refine those buckets into five core values. These should be broad things that can be used to guide the types of activities you prefer doing.

Experience	Bucket	Value

Intermission 1

Reflect!

As a brief exercise to engage with how you will: how do the values you stated at the beginning compare to the values "discovered" in the Rewarding Experiences section? Did the series of reflections change anything? Which feels more "right" to you?

Step 2 - Vision: Statements and Vignettes

End of Career Vision

End of Career Statement

As an example:

Values: Security

Rewarding Experiences: Teaching

Passions: Design and Engineering

Roles: Daughter

Possible basis for career end stage: You are a top engineer at a firm and have engaged heavily with outside organizations providing mentorship to folks looking to get into the engineering world. This career provides the stability and income to support yourself and your parents as they advance in age.

Consider yourself moving into retirement: Where are you in your career? What is your job and lifestyle like?

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Getting to End of Career

Now take four steps back from that career ending. What are the big steps (or leaps) that would take you from here to there? What actions would you take / accomplishments would you make? You may have to study others who have taken this path or think about it on your own.

Building on the above example (understanding, again, these are **broad leaps** that can and will change year by year):

Possible steps: From currently working as an admin at the college you graduated from, you might:

- 1) search for and reach out to folks with an established career as engineers; this will help you understand what the lay of the engineering land is
- 2) join a program for folks post-grad looking to join the flavor of engineering that speaks to you
- 3) use the program's connections to join an engineering firm
- 4) work through that firm / jump firms to advance in engineering career and build skills

What steps, leaps, phases do you see from now to your career end goal?

Steps

Matching End of Career against Values

Reassess the path above against the values that came out of Step 1. Perhaps you have the value of "family" and find it hard to fit family into that above arc. Copy the steps from above to below and make any modifications with these considerations in mind, trying to resolve conflicts where practicable.

Steps

Vignettes about you 10 years in the future

Write 3-5 paragraph-long descriptions or short stories about what your life is like 10 years from now. What is your life like? What do you do for work? What changes have come to your life? What are your routines like?

Vignettes

Life's Work Statement

Reflecting on your values from Step 1, imagine yourself on your deathbed. What would you be happy with having brought to the world? It can be something as tangible as "invented a way of ensuring that nobody dies from X disease" to something as intangible as "brought more joy to people", or even something "selfish" like "brought myself and my family maximum comfort".

This is for you: what is important for you to have done or experienced by the end of your days?

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INTERMISSION 2

Reflect!

As a brief exercise to engage with how you will: once again, we want to filter the Life's Work Statement through the previous artifacts we've created. Does it line up with your values, the

vision for your career, etc? Does anything need to be tweaked to line them up, or can there be space for both?

Step 3 - Action: Goals and Planning

Example here – instructions and a place to put your goals below:

Example

Goal 1: Establish connections with 3 engineers in industry

Justification and Background

How does this goal fit into my future vision and core values?

Given my distance from the engineering industry, I need to develop some "ins". Specifically, having a mentor in the space will be hugely helpful for me. I value stability, and leaning on someone who knows the lay of the land well will go a long way to navigating this transition.

Approach 1: Cold outreach on LinkedIn

How does this strategy get me closer as I pursue this goal?

Without an existing relationship with someone in the engineering world, I can use LinkedIn's search functionality to identify folks that fit the bill, of sorts. I may need to reach out to a large number of people before making the connection I'm looking for, but if someone responds positively to me looking for advice from outside, I think that reflects well on their mentorship capacity.

Concrete Goals and Metrics

Goal for the year: Establish connections with 3 engineers in industry

Goal for each quarter: Have a call with one active engineer (overshooting, to leave Q4 as backup)

Goal for each month: Reach out to 4 engineers on LinkedIn

Approach 2: Finding connections via my existing network

How does this strategy get me closer as I pursue this goal?

Similar to the above, I would find great value in connecting with someone already doing the work I am looking to do. By exploring my own network for folks I might not have known are engineers, or who know engineers, I'll be able to connect with folks with more social context/credibility off the bat.

Concrete Goals and Metrics

Goal for the year: Establish connections with 3 engineers in industry

Goal for each quarter: Identify a new method to engage my network for engineering contacts for this quarter (eg: post to LinkedIn, vs checking alumni network for folks with applicable area of study, etc)

Goal for each month: Engage my network according to quarter's method

Instructions

1. Identify large priorities for the year

Use the Values and Vision sections above to identify 4-6 large priorities for the year. These are intentionally broad, amorphous things.

2. Explain how these move you toward your vision

Now, for each priority, explain how it fits into the work we've done up to this point: How does achieving this objective move you toward your career end goal? How does it fit into your values and desired roles? How does it lead you to more rewarding experiences?

3. Brainstorm strategies to achieve each priority

With the explanation in place, outline a broad set of strategies or approaches you will take to getting there.

4. List concrete steps for each strategy

Now go into concrete steps to apply those strategies. Maybe this is a daily task. Perhaps you can set out a quarterly goal. Perhaps you need to take an action each week to make consistent progress. Whatever you do, you can lean on the SMARTER goal format: Specific, Measurable, Attainable, Realistic, Timebound, Evaluated, Reviewed/Rewarded.

Your goals go here:

Goal

Justification and Background

How does this goal fit into my future vision and core values?

Approach

How does this strategy get me closer as I pursue this goal?

Concrete Goals and Metrics

Goal for the year:

Goal for each quarter:

Goal for each month: