

Sam Matla Annual Review & Planning Template

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“There is no favorable wind for the sailor who doesn’t know where to go.” —
Seneca

Welcome to the ultimate annual review & planning guide for 2024/25. This is a comprehensive, in-depth review process that will help you:

- Process the loose ends, open loops, and generally perform a “deep clean” of your productivity system.
- Take stock of the year that’s been. The wins, losses, lessons, and everything else to help you gain insights about yourself, how you’re positioned, and how you might act differently in the year ahead.
- Define or redefine personal principles that help guide your goals, projects and decisions over the year to come.
- Set intentions for the next year.
- Get clear on your next 90 days of execution (I don’t recommend “strategic planning” your entire year—I’ll mention why later in the review.)

If you landed on this document from somewhere other than YouTube, then you may want to check out my detailed annual review & planning walkthrough.

[CLICK HERE FOR THE WALKTHROUGH](#)

Foundational Principles

I find it useful to remind myself of some key principles when I do my annual review. It helps me get in the right mindset, and not overthink the process. Here are those principles:

The act of reviewing and planning is just as beneficial as the review and plan itself

When’s the last time you sat down for hours and just looked at your life? Like really, deeply thought about it?

The process of introspection, of reviewing your last year *in detail*, is a powerful process in itself. It often leads to insights—some good, some bad—that you'd never have come across through passive introspection.

Simply going through the process of an annual review has a positive benefit. It forces you into a state that you aren't normally in. It encourages you to look at parts of yourself that you want to avoid. It can be painful, but transformative. In its own way, it's therapeutic.

Self-honesty is the first step in transformation

There have been times where I haven't wanted to do an annual review because I've felt like my year hasn't been great. Or times where I've wanted to skip reviewing a certain area of my life because I've completely neglected it.

It's not fun to review an area of your life over the past 12 months and admit to yourself that you completely failed. But what if you didn't review it? There's a significant chance you carry on failing over the next 12 months. It's not until you can look yourself square in the face and admit that you dropped the ball. Accepting where you're at is painful, but it's required to reorient and set goals and systems that can change that.

Meta-clarity is everything

I'm not a fan of intricate, granular plans. Life is too dynamic and moves too fast to gain such a specific level of clarity.

However, meta-clarity is everything. Knowing where you're going, who you are, what you authentically want, what you *don't* want, what your strengths and weaknesses are—that's meta-clarity.

Perhaps the biggest benefit of an annual review & plan is that it helps you gain meta-clarity. You might not know *exactly* what your next year looks like, but you know for sure which path you're on—and that you'll figure out how to overcome obstacles along the way.

Reviewing & planning doesn't always “feel” transformative

Don't expect to have a “Eureka” moment each year when you do your annual plan. Sometimes you need to go through the motions and just do the review, plan out some goals, and then do the work.

There have been years when I've felt zero emotion doing my review and plan. But I've done it anyway. There have been other years where I've been reviewing my year and felt extremely emotional reflecting on something that happened.

Just because you don't "feel" anything, it doesn't mean your review wasn't worthwhile or that your plan isn't good.

Your annual plan is a *starting point*

A lot of people get stuck when planning their year because they're worried they'll create a plan that's not optimal.

But a plan is not concrete nor set in stone. It's a starting point. It's a hypothesis. It's saying, "This is where I think I should go based on the knowledge I have now, and this is what I'm going to do until I have better information."

For example, at the end of 2021 my goal for 2022 was to transition out of my business and replace myself. Then I had an opportunity to sell my business, so my plan changed. And then that deal fell through, so I updated my plan yet again in Q4 of 2022. You can't plan for this kinda stuff.

Plans evolve. They are dynamic. They should be treated as such. But they are worth having, because without a plan, it's too easy to flounder and diffuse focus—achieving little.

PREPARATION PHASE

Step 1: The Setup

Most people go through their entire year without stopping to deeply reflect on *what* they're doing, *why* they're doing it, and *where* they're going. When they get to the end of the year, they rush through a token annual review.

We won't be doing that. This is no "normal" annual review. It's time-consuming, demands full mental focus, and requires a calm headspace. It is a type of *deep work* and you want to view it as such.

If you get the nagging feeling that you're being unproductive (because you're reviewing/planning and not *generating* anything, remember that the purpose of such a review is to cultivate insight and clarity. If it takes you several hours to work through this, but it leads you down a better path over the next 12 months, then it's a huge return on your time investment).

So, **you want to take this seriously**. You want the right setup before you start. That means:

- **Block out the time.**
 - I dedicate two days to this review process. 3-4h a day. It doesn't always take this long, but I don't want to rush it. You don't gain anything by rushing this process.

- If you can't block out long stretches of time like this, then consider working through it over the course of a week. An hour a day of dedicated focus.
- **Focused environment and mindset.**
 - As mentioned, this is deep work. It is cognitively demanding—particularly the *planning* phase. If you're constantly distracted and interrupted, it won't go well.
 - I like to get out of my normal environment and book a hotel or airbnb to work through my annual review. If you can do that—great. If not, just make sure your normal work environment is distraction-free.
- **Use pen and paper (at least for parts of the review)**
 - Yes, using a computer is more efficient. But efficiency is not the point of this review. There's a benefit to the slowness and intentionality of pen and paper—even if it takes twice as long. I like to do 80%+ of my review with pen and paper, and then I type it up afterwards.
 - On that note: I *strongly recommend* you avoid using AI as part of this process until the very end. Don't shortcut your thinking & introspection. Get to the end, and then plug it all in and ask for insights. Or wait until you really get stuck during the planning phase.
- **Wait until you're well rested & energized**
 - Because this is an introspective process, you don't want to start it in a poor physical and cognitive state. In other words, if you're sleep deprived, exhausted, or sick, then consider waiting until you feel better. You don't need to feel like a million dollars, but you shouldn't be in an acutely negative state or it will negatively affect how you think about and frame things.

Step 2: Processing

You want to start by getting your house in order: processing your digital and physical world. Get the admin stuff out of the way so you can go into the rest of your review with a clear mind.

This can be time-consuming, and mind-numbingly boring, but it's better than being halfway through your review and remembering that you need to reply to an email, or do some accounting task. It's also nice to enter the new year with everything squared up.

- **Clean & organize your workspace.** If you're performing your annual review from your office or home office, then start by getting organized. Clear your desk, put things in their place, and make it an environment you *want* to spend some time in.
- **Process your physical world.** If you have any paper documents, notecards, or other physical elements that need processed, do so.
- **Process email & other inboxes.** Get to inbox zero. If there are emails that need to be handled and can be done so in <2 min, then handle them. Otherwise convert them into todos.
- **Process task & project mgmt.** Review your list of tasks. Make changes, edits and updates as necessary. If there are unlogged todos and tasks in your mind, dump them in

and organize them. You want to externalise as many “open loops” as you can before starting the review process.

- **Other digital organization.**
 - Files & folders (downloads, desktop, etc)
 - Notes (don't go overboard, just organize).
 - Browser bookmarks

☐ **Action: Complete processing**

REVIEW PHASE

Step 3: Freeform/Narrative Review

Alright, go make yourself a drink and get ready to dive into the first “heavy lifting” part of the review process—the *Freeform review*.

A lot of annual review guides will start with questions and prompts. I don't like this approach because I think it boxes you in too early. It doesn't give you enough space to reflect and explore.

Instead of following a specific format to begin the review, you're going to *Freeform journal* about your year. This is a mind-dump. There are no prompts. There is no right and wrong way to do this. But there are **two rules**:

1. **Do not self-censor or self-edit.** Be completely honest with yourself. If you're frustrated with where you're at, or how your year has gone, then write it out in all its truth. Get it on the page. No one needs to read this other than you.
2. **Keep writing.** The most important thing is that you keep going. This is a momentum-centric activity, and it benefits from speed and flow. This means following tangents wherever they lead. If you start by journaling about the year that's been, and you end up writing about something entirely different, that's fine—let it happen. This is the process of introspection. When you notice yourself slowing down or getting stuck, gently bring yourself back to journaling about your year.

A few more tips for this step:

- It might be helpful to imagine a friend asking you, “So, how did your year go? I want to hear all the details. Don't hold back. Just tell me all about it.”
- Write like you talk. Don't try to sound smart. Don't try to write extremely well. Just write what you're thinking.
- There will inevitably be overlap between this freeform review and the next step. For example, one of the questions in the *Specific Review* step is “What went well this year?” And you'll likely answer that question in part during this freeform review. Don't worry

about this overlap. Crucially, don't "hold back" because you know you're going to answer the question later.

- Aim for at least 3 pages (if writing by hand) or 750 words if typing.

☐ **Action: Complete freeform/narrative review**

Step 4: Specific Review

Buckets/Areas Review

Feel free to add your own specific buckets. These are the ones I use.

Work/Career/Business

- What was the 20% of work that produced 80% of the results?
- Which projects did I finish? (List everything. E.g., If you're a writer, list all the articles or essays you wrote).
- What went well in this area? Did I achieve the goals I set? (If I set them)
- What didn't go so well in this area?
- Which lessons did I learn?
- What would I score this area out of 10? Why?

Health/Fitness

- What went well in this area? Did I achieve the goals I set? (If I set them)
- What didn't go so well in this area?
- Which lessons did I learn?
- What would I score this area out of 10? Why?

Family

- What went well in this area? Did I achieve the goals I set? (If I set them)
- What didn't go so well in this area?
- Which lessons did I learn?
- What would I score this area out of 10? Why?

Fun/Challenge

- What went well in this area? Did I achieve the goals I set? (If I set them)
- What didn't go so well in this area?
- Which lessons did I learn?
- What would I score this area out of 10? Why?

Spiritual/Faith

- What went well in this area? Did I achieve the goals I set? (If I set them)
- What didn't go so well in this area?
- Which lessons did I learn?
- What would I score this area out of 10? Why?
- **Example - Work/Career/Business:**

What was the 20% of work that produced 80% of the results?

- Emailing the list 3x per week instead of 1x per week (increased sales by 50% this year.)
- Upgrading existing customers into new "bundle" offer (added an extra 20% revenue with minimal work)

Which projects did I finish?

- Launched new product
- Put out 34 content pieces (would list these out)
- Launched podcast

What went well?

- doubling business revenue over last year
- worked less hours
- hired person to run marketing

****What didn't go so well?**

-** spend 2 months on a project that went nowhere because X, Y, Z

- lost momentum mid-year which slowed everything down

Which lessons did I learn?

- just because a project seems harder or more challenging, doesn't mean it will make the most money. Sometimes the lowest hanging fruit are the sweetest.
- decisiveness is everything. The best results came from moving quickly this year. Any momentum that was lost happened due to overthinking and inaction.

What would I score this area out of 10?

8.

Overall I'm happy with how business went this year. I exceeded my goal to grow revenue by 30%, and we did so without working any harder than last year. I focused on the fundamentals and avoided shiny objects, at least most of the time. Minus 2 points for losing momentum and spending 2 months on the project that went nowhere, which I kinda knew was a bad move but ignored it because I was excited and not thinking clearly.

Events

Think back and look over your calendar. What were the key events, experiences and highlights? (E.g., "Got promoted in June. Went on a 2-week trip to Europe.")

You've likely already written about these in your freeform review (at least the significant ones), but it's worth listing them out.

Character/Trait/Principles Review

There is some crossover between the bucket review step and this one, but it's worth doing anyway. Essentially, you rate yourself out of 10 for each trait, and then provide a brief explanation for your rating.

If you have *specific* principles, then I recommend rating yourself against them too. We'll look more at these and how they fit into the annual review & planning process in the next phase.

Again, if there are specific traits you want to review, then add them. These are the ones I use.

- **Work ethic & focus**

- Rating: /10
- Reason:

- **Confidence**

- Rating: /10
- Reason:

- **Action-orientation**

- Rating: /10
- Reason:

- **Generosity & giving**

- Rating: /10
- Reason:

- **Good friend/partner/sibling**

- Rating: /10
- Reason:

- **Self-discipline**

- Rating: /10
- Reason:

- ***Example - Work Ethic & Focus:***

Rating: 7/10

I was definitely “on and off” this year. I’d have periods of intense focus followed by laziness and procrastination. This was frustrating and I definitely noticed it in the lack of consistent output. That said, I still pushed forward and achieved some big goals. I worked harder than last year, so I’m grateful for that improvement, but still could improve this area over next year.

And the same for specific principles, if you have them. Here are a few of mine, for example:

- Instead of focusing directly on change, which is self-referential, throw myself into challenging external projects that force change whether I like it or not.

- Rating: /10
- Reason:

- High standards. High velocity. Narrow focus.

- Rating: /10
- Reason:

- Health and energy are the foundation. Do not neglect them.

- Rating: /10
- Reason:

- ***Example - High Standards. High Velocity. Narrow Focus:***

Rating: 8/10

I acted in accordance with this principle throughout most of the year. I worked on challenging projects—usually one at a time to maximize focus. And I set short deadlines that induced pressure. There was a month or two where I lagged behind and got comfortable, but other than that it was good.

General Review Questions

- Which activities drained you, and why?
- Which activities energized you and made you feel most alive, and why?
- Which people drained you, and why?
- Which people energized you and made you feel most alive, and why?
- In what ways did I self-sabotage?
- In what ways did I overcome the resistance and escape the comfort zone?
- Which skills or significant new knowledge did I acquire, if any?
- What was I wrong about?
- Which lessons did you learn? (beyond what you've already written about in the buckets/areas review)
- If some third-party observer was to write an overview of your last year, what would they write? Specifically, what would they write about *how* you acted and the decisions you made (or didn't make?)
- What are the biggest personal bottlenecks you're currently facing?
 - *Example: my lack of good sleep routine and hygiene means constantly low energy levels. (Maybe you have a newborn and there's only so much you can do, but some improvements could perhaps be made). Or: My lack of focus ability is holding me back. I need to focus on building my daily deep work habit.*

☐ **Action: Work through all the review questions**

BRIDGE PHASE

Step 5: Principles

"Principles are deep, fundamental truths, classic truths, generic common denominators. They are tightly woven threads running with exactness, consistency, beauty, and strength through the fabric of life." — Stephen Covey

Principles are higher level *ideals* that you want to abide by. They act as filters for your planning, decision-making, and actions—especially if you *prime* yourself with them on a regular basis (which is why I recommend printing out your list of principles and reviewing on a daily basis. I know it's typical self-help stuff, but it *works*).

A couple points here:

- Principles are idealistic. They are not a representation of your worst self, but your best self. The best version of you abides by these principles.
- Principles are also likely to change over time based on your priorities and focus. At the moment, I'm heavily involved in my work and most of my principles revolve around that. Previously, they've been less work-oriented and more family oriented.
- Principles can be quotes that mean something to you. They can be things you've written. There's no format. They just have to have deep meaning. There needs to be *emotional resonance* with them.
- Take some time to really define these. Sell them to yourself. Set no more than 10.

Here are my six for the previous year:

- If I'm not failing occasionally, I'm being too conservative.
- The work works on me more than I work on it.
- Power is derived from taking responsibility, weakness from disavowing it.
- High standards. High velocity. Iron focus.
- Water flows downhill. Get directionally accurate, create alignment, and find the path of leverage.
- "Acting for the sake of acting, and choosing churn over stability, is central to life and its intensification. Favor chaos creation." - Venkatesh Rao
- **Tip: Detail why you chose your principles**

Ideally, for each principle you have 1-3 paragraphs explaining why it's a personal principle and why it's important.

Here's mine:

If I'm not failing occasionally, I'm being too conservative.

I know my tendency is to play it safe and small, and I have the luxury of doing so. I know that ultimately, my future self will regret being too conservative. Therefore, I need to ensure that I'm failing occasionally, as that's a signal that I'm pushing myself and my personal boundaries.

The biggest risk is not taking any risk.

The work works on me more than I work on it.

Remember, there is immense value in simply *doing work*. Being consistent, staying focused, finishing projects—this *grows* me as an individual. That growth is more important than whatever external results arise from the work being done.

The clarity I seek is in the work I'm avoiding.

Power is derived from taking responsibility, weakness from disavowing it.

Being underloaded is just as bad as being overloaded. I must lean into responsibility because it's what leads to personal growth. I also like the feeling of being responsible for things, even if it can be uncomfortable in the moment.

The times I have abdicated responsibility are times I regret and do not want to repeat.

High Standards. High Velocity. Iron Focus.

I must do the best work I can without being a perfectionist. I must redeem the time and operate a fast cadence, not only because it feels incredible having such a strong sense of momentum that comes with such speed, but also because it leads to better results over the long term due to compounding. And to do both of these, I must focus with intensity, blocking out distractions and low-leverage tasks and projects.

Water flows downhill. Get directionally accurate, create alignment, and find the path of leverage.

I am a 100x more effective person when I'm working on things that interest me and feel important. Figuring out what those are, and what the path looks like is crucial. It is also a

process of trial and error, not just theory. Find this path through action, but step back occasionally to review, reflect, and reorient.

"Acting for the sake of acting, and choosing churn over stability, is central to life and its intensification. Favor chaos creation." - Venkatesh Rao

In the absence of clarity or certainty, act on *something*. Create churn. Intensify. Get in motion. Every time I've done this in the past, it's resulted in progress. Conversely, spending too long trying to optimize for stability and theorize my way through everything has not been helpful, but in fact detrimental.

☐ **Action: Define your principles, print them out.**

Step 6: Position

If you plan without considering your position, then your plan will likely be mediocre. You want to get clear on your unique sources of advantage, your bottlenecks, and your resources so that you can plan from there.

It's incredible how few people do this. They simply set goals for the new year based on some aspirational ideal, without paying any attention to leverage points that already exist within "the system." This is not strategic. The starting point for strategy is looking at *where you are* and *what you have*.

"A great idea or great strategy that you can't execute well, isn't a good strategy for you." — Jason Cohen

Working through the following questions/prompts will serve as a great foundation for planning out the next year's goals, theme/narrative, and 90-day objectives.

- What skills do I have?
- What's the work that feels like play to me? (e.g., "I can write for hours on end where most people struggle to get started")
- What areas of knowledge do I have reasonable depth in?
 - How do these areas overlap—if they do—to produce unique insights that can give me an edge?
- What am I curious about? (Curiosity is a powerful driver of motivation/energy—and should be considered a source of leverage).
- Who's in my circle/network?

- Who's on my team? (if you have a team)
- How much "time" resource do I have? (Obviously, everyone has the same 24h in a day. But the person who has three children and is taking care of their aging parents has less "free time" to put towards a side hustle, for instance, than the unemployed 19-year-old).
- How much "energy" resource do I have? (If you're a high-energy person, then this is a source of advantage. If you're low-energy, this can be seen as a bottleneck that should be solved for).
- What are my financial resources? (Relevant with goals/planning, because being able to pay to outsource work = leverage).
- What other sources of advantage do I have? (Take the time to brainstorm here)

☐ **Action: Review your position**

PLANNING PHASE

Step 7: Goals

I like to plan the next year at a "high level." Not too much definition or detail, because things change. The more detailed, actionable planning should happen on 90-day timescales IMO (which we'll tackle in the next step).

If you're planning in 90-day cycles, then you'll be reviewing your annual goals every quarter and can adjust as needed (if circumstances change).

Principles for goal-setting:

- Less, but clearer and better. Simplicity wins.
- Challenging enough to create activation energy and motivate you, not too challenging as to be discouraging.
- Commitment to goals has its own meta-benefits, regardless of what the goal is. In other words: you gain something by simply applying yourself in pursuit of a goal, regardless of whether that goal is the most optimal goal you could have set. This means you shouldn't overthink your goals, and you shouldn't try to set perfect goals (you can't, because you don't have perfect information). But it does mean that you should view your goals as *commitments*. They are not "nice to dos" they are "must dos"

Questions to ponder:

- What could you work on that your future self would respect you the most for?
- What is the obvious but scary goal you should set?
- Are you setting goals based on what you *think* you desire, or what you *authentically* desire?
- Which goal would produce the most personal growth if achieved?

Goal-Setting by Bucket/Area

Write as many goals as possible for each bucket. This is a brainstorming exercise, so just jot down any goal that comes to mind, even if it seems stupid.

Work/Career/Business

Health/Fitness

Family

Fun/Challenge

Spiritual/Faith

—

Now, **narrow each bucket down to 1-3 goals.** Max. It's better to have *one* challenging goal than 3 mediocre ones that you wouldn't care about if you achieve.

Don't set more than three.

☐ **Action: Set 1-3 goals for each area**

Step 8: 90-Day Sprint Cycle Plan

"...the more uncertain and dynamic the situation, the more proximate a strategic objective must be. The proximate objective is guided by forecasts of the future, but the more uncertain the future, the more its essential logic is that of 'taking a strong position and creating options,' not of looking far ahead." —Richard Rumelt (Good Strategy, Bad Strategy)

Planning out your entire year in detail is difficult because you don't know exactly what's going to happen. Life is dynamic, and plans are only so useful.

I like to operate on a quarterly planning cadence. It's enough time to *fully commit* to something without getting hung up on opportunity cost and overthinking. When you plan for a full 12 months, it's easy to get stuck, because you start thinking, "Well, if I commit to this for 12 months

and it's a mistake, that's a huge waste of time!" But if you commit to something for 3 *months* and it doesn't work out, it's not as big a deal.

90-Day Cycle Planning Principles:

- Anti-incremental. Find the path of leverage. Reference your *position* review from earlier.
 - Working on *something* is better than working on nothing. If you find yourself getting stuck in analysis paralysis loops, then remind yourself of this. The path of leverage is found in *doing*, not endlessly theorizing.
- Make your goals commitments.
- Play iterated games aligned with long-term vision
- Do what is important, not merely urgent.
- Solve problems, don't just capture opportunities.
 - Opportunities are shiny and fun, and usually the work you like doing. Problems are pretty easy to define but hard to work on and generally create a lot of resistance.
- Do less, but better. Don't diffuse focus unnecessarily. Also don't underload yourself.
 - Sometimes, [working on multiple projects](#) can be a *good* thing if working on one means you'll be underloaded. There's a certain threshold of demand and busyness that makes you more effective.
- Seasons, not constant balance.
 - Some cycles you might want to focus on your health more and work less.
 - What you don't want to do is try to balance everything equally all at once. I don't think this works well. It also doesn't allow for intensity.

The Three Steps to 90-Day Planning

There are three main steps to planning out a 90-day cycle:

1. **Divergence.** An open, creative brainstorming process where you list everything you *could* work on over the next 90 days. This is particularly useful if you're not yet clear on *what* it is you should focus on, but it's also useful even if you do have an idea of what to do, because it can often trigger better goals & projects that you haven't thought of prior.
2. **Convergence.** Narrowing down and deciding what to work on.
3. **Definition.** Is about drilling down into specifics. The *how*. What actions will you take? What are the systems you'll use? How will you structure things?

Step 1: Divergence

list out all the possible things you could work on over the next 90 days, including but not limited to:

- Goals: work/physical/family/spiritual (look at your areas from the previous step)
- Projects. Both ongoing projects, new projects, or those you've put on the backburner.
- Problems that could or need to be solved

- Opportunities that could be captured
- Anything else that comes to mind. There are no restrictions here

It's important that you don't self-critique as you do this. Don't judge what you're writing down. You can do that in the *convergence* step. Right now, you're brainstorming.

I would encourage you to spend at least 30 mins on this, and push yourself past the point of "feeling stuck." Often, some of the best ideas, goals and projects that you can work on come as a result of pushing past that feeling.

- **Here's an example of what a divergence list might look like:**
 - Create Focused90 course and launch
 - Write first draft of book
 - Publish 15 YouTube videos
 - Cut 10 pounds of weight
 - Train for a half-marathon
 - Launch new product in my business
 - Fix leads problem in my business
 - Go to 2 events per month to make new friends/network
 - Take up a new hobby
 - Work on my relationship
 - (Dozens of other items)

👉 **Note:** if you're currently in a position where you know exactly what you need to focus on (as in, there's an important goal or set of goals that absolutely must be done and you're fairly confident that going through this divergence exercise won't change this focus), then you can skip this step and move on to the *definition* step to map out your cycle in detail.

☐ **Action: Write your divergence list—everything you could possibly work on.**

Step 2: Convergence

Now, you must choose. This is a challenging step for most people because it naturally introduces trade-offs, opportunity cost, and can quickly lead one into analysis paralysis if not careful.

You want to look at your list and identify what you think are the most important goals/projects that you could realistically tackle in the next 90 days. As you're doing this, think about demand/load/focus. Remember the golden mean of challenge: you're looking for the right amount of load. It should be challenging, but you shouldn't spread yourself too thin.

Generally, people have a tendency to spread themselves too thin. As much as you can, you want to narrow your focus and raise your standards. It's fine to have multiple goals—especially if they're across different areas of life—but you have to recognize the potential trade-offs.

For example: you *could* launch a new product in your business, fix the leads problem, and go to 2 events per month to network. But it's likely that if you just focused with intensity on *one* of these (fix the leads problem) and did it really well, that it would have more impact.

Two questions to keep in mind as you work through this convergence process looking at each option:

- Is this the highest leverage thing I could do? Is there a better goal that I'm choosing to ignore because it's outside my comfort zone (but will lead to more growth and results?)
- Is this a problem that needs to be solved, or an opportunity that I want to capture? Am I chasing a shiny object opportunity that interests me at the expense of solving an important problem?
- **Tip: Argue for your choice**

It's useful to write out *why* you're choosing to converge on a particular goal or project. This helps with stickability and commitment.

For example, here are a few of the objectives I converged on during my last 90-day cycle, with reasons *why* I converged on them:

- Publish 15 YouTube videos and reach my long-term 100 videos goal.
 - This is the most important goal, because it fulfills my long-term goal of 100 videos, which I'm already pre-committed to fulfilling.
 - It also builds my personal brand and leads to serendipitous opportunities.
 - I'm currently in the "grind" stage of this long-term goal, and continuing to push through it will lead to significant personal growth, in ways that other goals likely won't.
- Cut weight to 87kg
 - This is important for health and aesthetic reasons. Mostly, I'm doing it for the challenge.
- Finish Math Academy course
 - This is a curiosity goal/hobby for me, but also requires discipline to work through. It's an important goal because it grows my mind and forces me to think about something else other than work.

☐ **Action: Converge on a few key objectives/projects (and write out *why* you've chosen them specifically)**

Step 3: Definition

For each goal, we want to run it through three key steps/questions:

1. What are the key steps, tasks and milestones?
2. What systems do I need to put in place?
3. What is the *cost* of this? (Time, resources, sacrifice, etc)

Key steps:

This is where you break things down in detail. For example:

- **Objective 1:** Publish 15 YT videos to hit my 100 video goal
 - Ideate 5 video ideas (~3h)
 - Brainstorm, outline, draft, record & edit video 1
 - Brainstorm, outline, draft, record & edit video 2
 - Ideate next 5 video ideas (~3h)
 - Etc
- **Objective 2:** Cut to 87kg (from 91kg)
 - Key milestones:
 - 90kg
 - 89kg
 - 88kg
 - 87kg
 - Action steps:
 - Rely purely on daily/weekly systems for this, given it's a process-oriented goal.

☐ **Action: Write out the key steps, tasks and milestones for each objective you've converged on.**

Systems/core processes:

You want to define the systems that enable you to complete these tasks and steps. Saying "I'll make 5 YouTube videos" is merely a desire. It needs to be structured as a system, like "I'll spend 2 hours every morning writing scripts."

Not every goal can be reduced to pure systems (especially those that are dynamic), but where possible, you should identify and define the actual processes that will move the needle.

Taking the example from above:

- **Objective 1:** Publish 15 YT videos to hit my 100 video goal

- Key milestones:
 - Vid 86
 - Vid 87
 - ...
- Action steps
 - Ideate 5 video ideas (~3h)
 - Brainstorm, outline, draft, record & edit video 1
 - Brainstorm, outline, draft, record & edit video 2
 - Ideate next 5 video ideas (~3h)
 - Etc
- Systems:
 - Daily:
 - Write 90 mins on YT scripts every morning
 - Ideate 10-15 mins every morning
 - Weekly:
 - Batch film on Fridays
- **Objective 2:** Cut to 87kg (from 91kg)
 - Key milestones:
 - 90kg
 - 89kg
 - 88kg
 - 87kg
 - Action steps:
 - Rely purely on daily/weekly systems for this, given it's a process-oriented goal.
 - Systems:
 - Daily:
 - Track macros
 - Weigh myself every morning
 - Walk 10k steps
 - Sleep by 10pm
 - Weekly:
 - 4x lifting sessions
 - 3x cardio
 - 2-3x BJJ

☐ Define the key systems/habits that will enable you to achieve your objectives

- **A note on “general life systems” (aka *habits*)**

There are systems you may want to develop that exist outside of specific goals and projects. Make sure to define them.

For example, a general life system might be to wake up at 6am each day. It's not an area-specific system, but it does impact all the others.

Personally, all my systems/habits fall under specific objectives. I know I'm more likely to build habits and adhere to them if there are strong reasons for doing so.

Cost:

Every action you take has a tradeoff. The 3 hours you spend on a particular project each day means you can't spend those 3 hours on something else.

You want to define the *costs* of pursuing your objectives, for a few reasons:

1. It will refine your plan. Sometimes, when you start counting the cost, you realize your plan is too ambitious and you're not comfortable with the tradeoffs (or the opposite: you realize you can do *more*).
2. Similarly, you might find that you don't care enough about an objective given its cost, and you'll choose something else instead.
3. You won't be as surprised when you're busy, in the thick of it, a little stressed. You've told yourself in advance that there's a cost.

Now, go celebrate the end of the year, and get ready to execute on your first 90-day sprint.