

ANNUAL REVIEW

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| +Look for GEMS | -Time LOST | • Purpose Planning |
| • Goals achieved | • Lessons learned | • Look at priorities |
| • Experiences | • Obstacles & challenges | • Assess VIP AIMS |
| • Milestones | • Solutions | • Note effectiveness of productivity |
| • Set new goals | • Time wasted | |

SET GOALS

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|--|------------------------------|
| ↳ Personal Goals | ↳ Purpose goals |
| MIND: Mental, Career, Financial | • Set to align with mission |
| BODY: Physical, Recreation, Organization | • Tie in with personality |
| HEART: Relationships, Emotional, Social | • Add high value |
| SOUL: Character, Purpose, Spirituality | • Relate to work key results |
| | • Strengths are utilized |

PLAN GOALS

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| ↳ Set objectives & key results | • Written | • Specific |
| • Why? - desired outcomes | • On target | • Measurable |
| • Objectives - WHAT is the <i>right</i> direction? | Really SMART → | • Attainable |
| • Reveal meaningful measures | • Keep you motivated | • Relevant |
| • Key results – HOW to get there? | | • Time bound |

EXAMPLE OKRS

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| ↳ Personal | ↳ Business - Google |
| VIP AIM: increase happiness | • Vision-to provide access to the world's information in one click. |
| Objective: build a strong relationship | • Mission- to organize the world's information and make it universally accessible. |
| ↳ KR1: Have a monthly date night | • Objective: build the best web browser |
| ↳ KR2: Eliminate distractions | ↳ Key Result: measured by #r of browsers |

OBJECTIVES & KEY RESULTS

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|--------------|--------------|
| • VIP AIM: | • VIP AIM: |
| • Objective: | • Objective: |
| ↳ KR1: | ↳ KR1: |
| ↳ KR2: | ↳ KR2: |
| • Objective: | • Objective: |
| ↳ KR1: | ↳ KR1: |
| ↳ KR2: | ↳ KR2: |

VIP AIMS

- ↳ What are not urgent but *important* VIP AIMS? → see purpose planning
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|-----------------------|----------------------------|----------------------------|
| • Values → | ↳ Follow VALUES | ↳ UNLOCK purpose |
| • Increase well-being | • Variable personal values | • Understand yourself |
| • Pursue purpose → | • Always point the way | • Need to chase |
| • Active | • Lead to what matters | • Love to learn about |
| • Inspiring | • Unchanging core values | • Often lose track of time |
| • Meaningful | • Express authentic self | • Change you crave |
| • Solutions | • Strengths of character | • Keep wanting to build |

↳ Increase well-being

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|--------------------------|------------------|-----------------------------|
| PEOPLE | ↳ Pursue PURPOSE | • Spend time in prayer |
| • Sharing | • Awareness | • Observe nature |
| • Emotional intelligence | • Spirituality → | • Understand beliefs |
| • Authentic connection | • Plan goals | • Listen to music |
| • Relating | • Inspire flow → | • Find feedback |
| • Communication | • Renew energy | • Look for balance |
| • Helping others | • Expand growth | • Observe strengths |
| | | • Work without distractions |

↳ Active

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|-----------------------|------------------------|--------------------|
| • Direct | | ↳ Inspiring appeal |
| • Repeatable | | • Surprising |
| • Effective | BIG impact | • Emotional |
| • Achievable | • Bold change | • Amusing |
| • Make a BIG impact → | • Impressive influence | • Rare |
| • Sustainable | • Great movement | • Clear |
| | | • Helpful |

What is the most significant action to take? How will it be achieved?

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|---------------------------|---------------|
| ↳ Meaningful -OUTCOMES | CLEAR needs |
| • Relevant | • Connection |
| • Advance progress | • Learning |
| • Meet needs → | • Expertise |
| • Produce desired results | • Autonomy |
| • Significant | • Recognition |

How will a successful outcome be measured?

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|------------------------|------------------------------|
| ↳ SUCCESSful Solutions | KEY RESULTS |
| • Solve issues | • Metrics |
| • Understandable | • Explain how many or much |
| • Complete | • Add check marks to a chart |
| • Commit to measures → | • Steps to completion |
| • Elegant | • Use numbers |
| • Smart | • Rating scales |
| • Simple | • Examples |