THE ANNUAL PLANNING GUIDE

A simple framework to achieve dramatic results
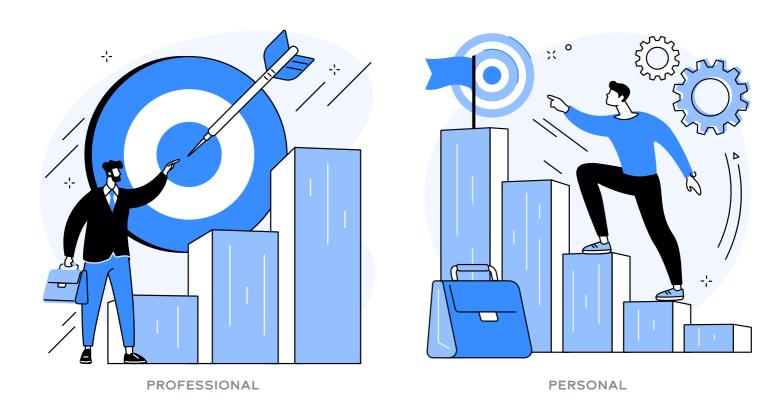
SAHIL BLOOM

01

The Goal-Setting Framework

There are two primary categories to consider as you plan for the year ahead:

1. Professional
2. Personal.

PROFESSIONAL

PERSONAL

Note: This is based on my personal simplicity preference to keep it to just two primary categories. Some of you may prefer to break this up further, in which case you might split the one big Personal category into Health, Relationships, and Personal.

GOAL SETTING FRAMEWORK - FOR PROFESSIONAL

For each primary category, my goal-setting framework has four connected components:

01

BIG GOALS

These are your big, audacious goals. These should be big and ambitious—but stop short of being completely ridiculous.

The Big Goals are the summit of the mountain—motivating on a macro scale, but perhaps too far off, grand, and intimidating to be motivating on a micro daily basis.

02

CHECKPOINT GOALS

Work backwards from your Big Goals to formulate a set of Checkpoint Goals.

If the Big Goals are the summit of the mountain, the Checkpoint Goals are the mid-climb campsite.

You can't reach the summit without reaching this point, as all paths lead directly through it.

03

DAILY SYSTEMS

"You do not rise to the level of your goals. You fall to the level of your systems." — James Clear, Atomic Habits

The Daily Systems are the key to the entire framework.

These are the 2-3 daily actions that you need to take to create tangible, compounding forward progress—the simplest daily actions to generate progress in a given arena.

If the Big Goals and Checkpoint Goals are your compass, setting your direction, the Daily Systems are your feet, actually moving you forward on your climb.

04

ANTI-GOALS

"All I want to know is where I'm going to die, so I'll never go there." — Charlie Munger

Anti-Goals are the things we DON'T want to happen on our journey to achieve our Big Goals.

Anti-Goals are about avoiding the Pyrrhic victory—a victory that takes such a terrible toll on the victor that it might has well have been a defeat.

If the Big Goals are your summit, Anti-Goals are the things you don't want to sacrifice while executing the climb—like your life, your toes, or your sanity. You want to reach the summit, but not at the expense of these things.

GOAL SETTING FRAMEWORK - REFERENCE

BIG GOAL -01

Hit 500,000 subscribers on The Curiosity Chronicle newsletter by end of year.

CHECKPOINT GOALS FOR BIG GOAL -01

Hit 300,000 subscribers on The Curiosity Chronicle newsletter by end of June 2023.

DAILY SYSTEMS FOR CHECKPOINT GOAL -01

1. 30 minutes of focused reading

2. 30 minutes of focused writing

3. Daily management check-in with my newsletter growth team.

ANTI GOALS

1. Never "sell out" with low quality, growth-hacky content

2. Never let the newsletter writing hinder the book writing process.

GOAL SETTING FRAMEWORK - PROFESSIONAL

ACTION ITEMS

BIG GOALS

Select 1-3 specific, measurable Big Goals within each category. Crystallize these Big Goals. Write them down.

CHECKPOINT GOALS

Select 1 specific, measurable Checkpoint Goal for each Big Goal. Write it down below the associated Big Goal.

DAILY SYSTEMS

Select 1-3 specific Daily Systems for each Checkpoint Goal. Write them down below the associated Checkpoint Goal.

BIG GOAL -01

CHECKPOINT GOALS FOR BIG GOAL -01

DAILY SYSTEMS FOR CHECKPOINT GOAL -01

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BIG GOAL -02

CHECKPOINT GOALS FOR BIG GOAL -02

DAILY SYSTEMS FOR CHECKPOINT GOAL -02

GOAL SETTING FRAMEWORK - PROFESSIONAL

ANTI GOALS

Invert the problem:
- *What are the worst possible outcomes that could occur from your pursuit of these Big Goals?*
- *What could lead to that worst possible outcome occurring?*
- *What would you view as winning the battle but losing the war?*

RESPONSES

ANTI GOALS

GOAL SETTING FRAMEWORK - PERSONAL

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BIG GOAL -01

CHECKPOINT GOALS FOR BIG GOAL -01

DAILY SYSTEMS FOR CHECKPOINT GOAL -01

GOAL SETTING FRAMEWORK - PERSONAL

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BIG GOAL -02

CHECKPOINT GOALS FOR BIG GOAL -02

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RESPONSES

ANTI GOALS

02

System-Building Mental Models

Even with our Big Goals to motivate us and our Daily Systems all planned out, we may fail to execute. Ideas are CHEAP, execution is EXPENSIVE. To guide your execution against your Daily Systems, here are four system-building mental models to consider...

TWO-DAY RULE

With whatever habit you're trying to build, never allow yourself to skip more than one day in a row.

The science agrees. Quoting a study in the European Journal of Social Psychology: "Missing one opportunity to perform the behaviour did not materially affect the habit formation process."

Skipping one day won't hurt your habit building, as long as you don't skip the next one.

30-FOR-30 APPROACH

Do the thing you're trying to improve at:
- 30 minutes per day
- 30 straight days

30 days of effort is a real commitment. If you are half-in, you won't want to take it on and commit to the 30 days.

30 minutes per day is short enough that you can mentally take it on. Pre-start self-intimidation is one of the biggest drivers of stagnation.

30 days of 30 minutes per day is 900 total minutes of accumulated effort. This will yield surprisingly significant results.

HABIT STACKING

James Clear famously pointed out that we execute on Daily Systems most effectively when they are fixed to a time or action that makes them easy to structure and regiment.

He calls this Habit Stacking:

- "I'll journal 30 minutes before bed."
- "I'll do 25 pushups when I get out of bed."
- "I'll read 30 minutes of my favorite novel while doing cardio."

It's a simple, effective behavioral trick to execute against Daily Systems.

MINIMUM VIABLE PROGRESS

Never skip a day, but anything above zero counts.

Have a goal in mind to do 30 minutes of the action every single day—but if you can't hit that, just do any tiny amount above zero.

Remember: Anything above zero compounds!

03

Tracking and Adjusting

There's an aviation concept referenced in Atomic Habits called the 1-in-60 Rule. It says that a 1 degree error in heading will cause a plane to miss its target by 1 mile for every 60 miles flown.

The concept applies directly to your annual planning. Tiny deviations from the optimal course are amplified by distance and time. A small miss now creates a very large miss later.

This highlights the importance of real-time course corrections and adjustments.

Here's a strategy I use to track and adjust my course during the year:

Conduct a monthly check-in on the last Friday of each month.

Conduct a monthly check-in on the last FRIDAY of each month.

Answer 3 Core Questions

The ritual takes ~30 minutes each month and creates an opportunity for monthly reflection and course correction on your journey.

What really matters right now in my life and are my Big Goals still aligned with this?

This is a simple way to pressure test your Big Goals and ensure they are still the right ones.

Are my current systems aligned with my Big and Checkpoint Goals?

Assess the quality of your Daily Systems and whether they are creating the appropriate momentum. If not, make adjustments accordingly.

What do I need to cut from my life to progress more efficiently?

Assess the quality of your environment and evaluate whether there are any toxic habits or relationships that are a drag on your growth. Make necessary changes.

Your Annual Planning Process

This annual planning process has been an immensely helpful exercise to which I would credit many of my greatest achievements.

I hope that it will spark you to conduct your own before year-end, as I'm highly confident you will get the same value that I have from the exercise.

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