

Refine Your Life

Participant Guide (Just the "Goals" Section)

A PROCESS OF SELF-EXPLORATION DESIGNED TO HELP YOU ...

- Simplify, balance and prioritize your life
- Find focus, direction and purpose
- Ignite your motivation
- Achieve your goals

Presented by Pilar Gerasimo

© Pilar Gerasimo, 2001–2014. All Rights Reserved

:



CONTENTS

■ Introduction

- Welcome!
- Tidbits and Suggestions
- Tips for Success
- Coaching Agreement

■ Program

- Session 1: Start Where You Are
- Session 2: Clarify Your Vision
- Session 3: Cultivate Your Goals**
- Session 4: Overcome Obstacles and Celebrate Success

Enjoy your free "Goals" chapter!

Want to get a sense of the whole Refine Your Life Workbook? Watch Pilar's one-hour video overview, "How To Refine Your Life (or Change it Completely)," available at <https://youtu.be/V8FKMhuaKvA>

WELCOME!

Congratulations on taking a bold and exciting step into living at your full potential!

This program is designed to present you with a proven process and a set of valuable life skills that you can apply to any and all areas of your life, from health and fitness to career, finance, relationships and more.

Seeing your best self takes vision. Becoming your best self takes guts.

This process will support you in doing both.

The objective of the program is to supply you with the skills and perspectives you need in order to achieve greater life balance, satisfaction and success. It's also designed to help you better manage your time, energy and choices so you can make steadier progress toward your most important personal goals and priorities.

Finally, the program is designed to be a fun, energizing and all-around positive experience.

Over the next four weeks, we will cover a variety of topics, including:

- Identifying your personal values and priorities
- Envisioning and connecting with your best reality
- Establishing goals, action plans and commitments
- Identifying and overcoming obstacles
- Assessing and celebrating your successes

Each session will consist of a combination of presentation, interactive discussion, and one or more in-class projects or exercises. Between sessions, you'll have some independent work or journaling exercises to complete.

At intervals, you will also be provided with links to helpful articles from *Experience Life* magazine and other resources to help you go deeper with the material.

By the end of the process, you will have discovered a set of valuable skills with the potential to dramatically improve the overall quality of your life.

Thanks once again for participating in the Refine Your Life course, and congrats on taking such a powerful step toward living a life that brings out the best in you — so you can *share* your best with others.

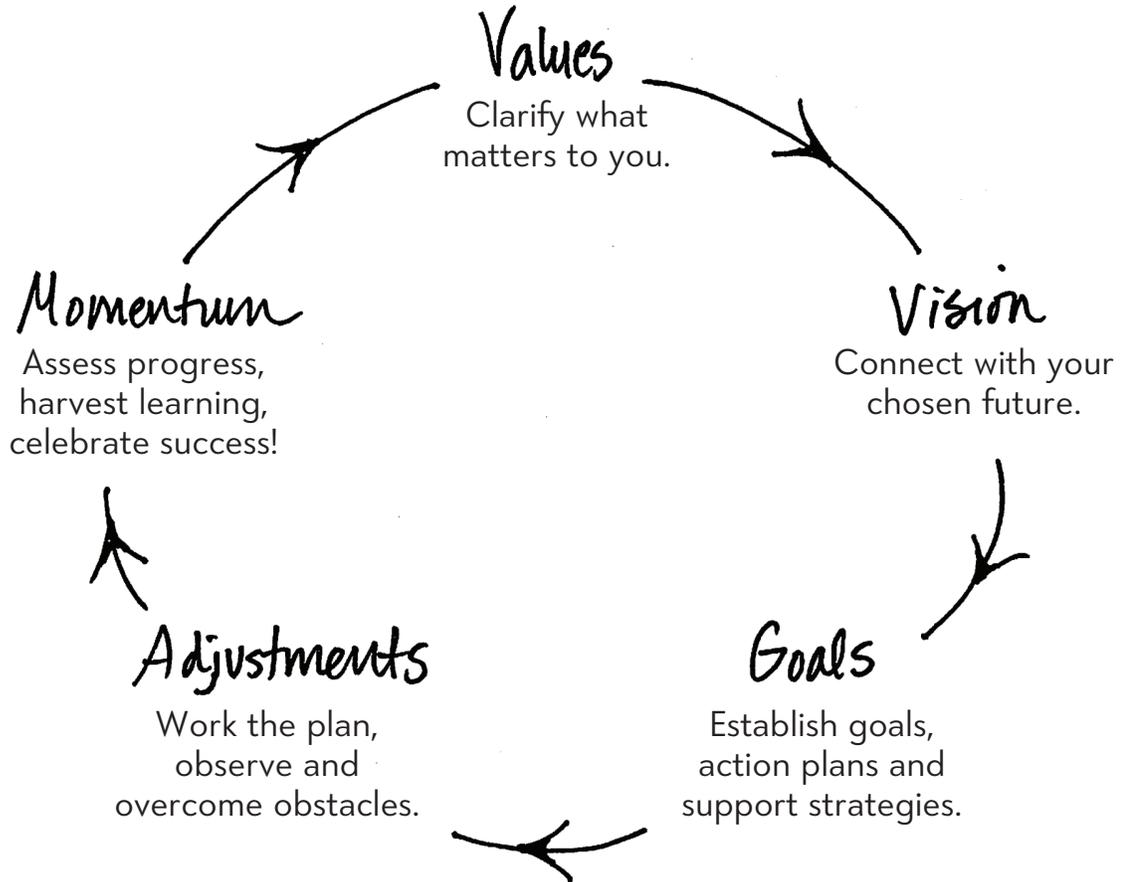
If you have any questions, suggestions or requests, please don't hesitate to ask.

Yours in health and happiness,

A handwritten signature in cursive script that reads "Pilar Gerasimo".

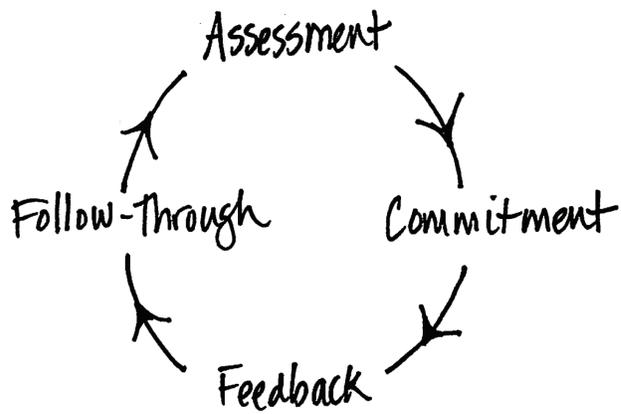
Pilar Gerasimo

PROCESS OVERVIEW



The arrows represent action!

HOW CHANGE WORKS



To accomplish great things,
we must not only act, **but also dream;**
not only plan, **but also believe.**

— Anatole France

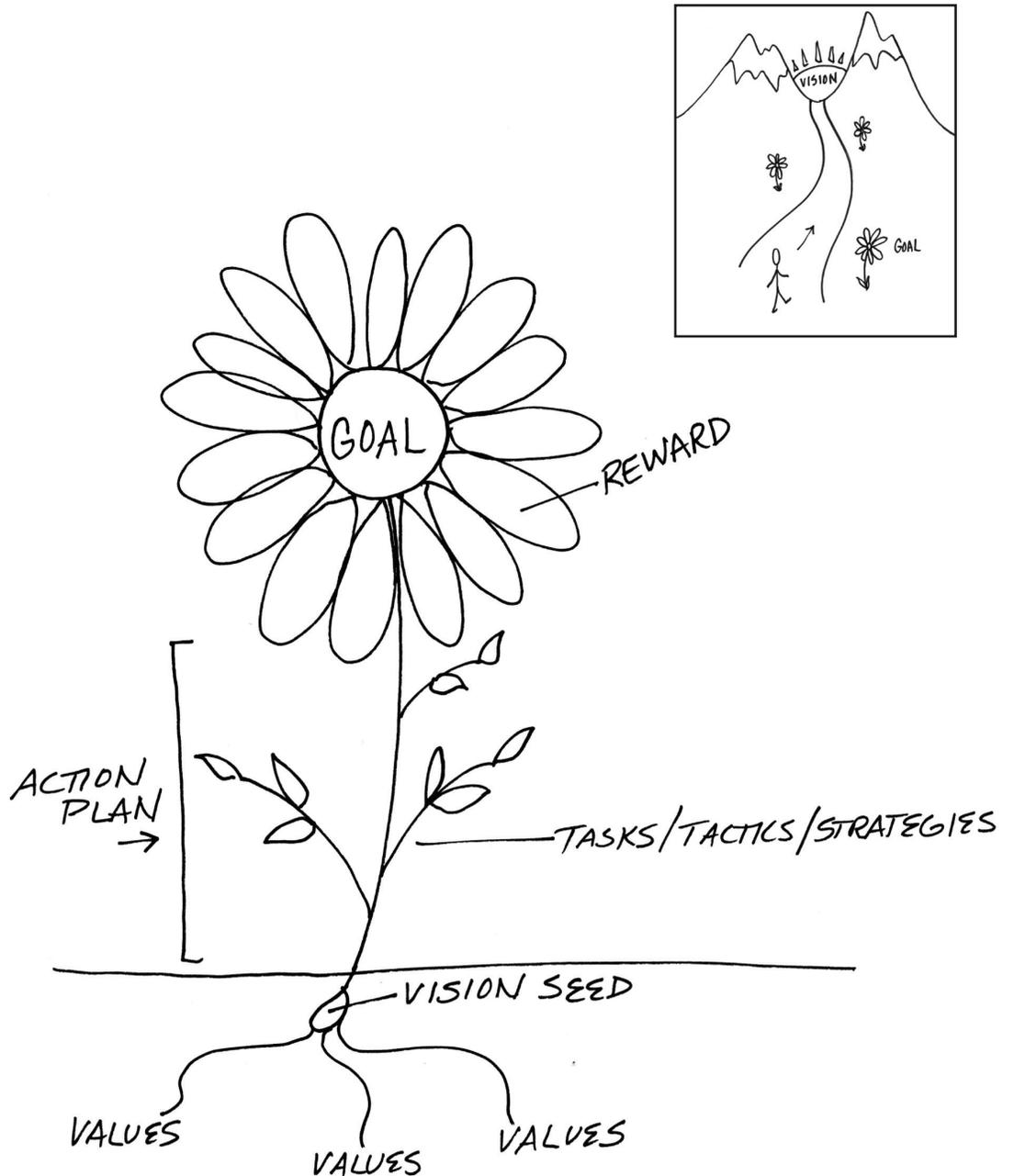


Session 3: *Cultivate Your Goals*

SESSION 3: GOALS AND ACTION PLANNING

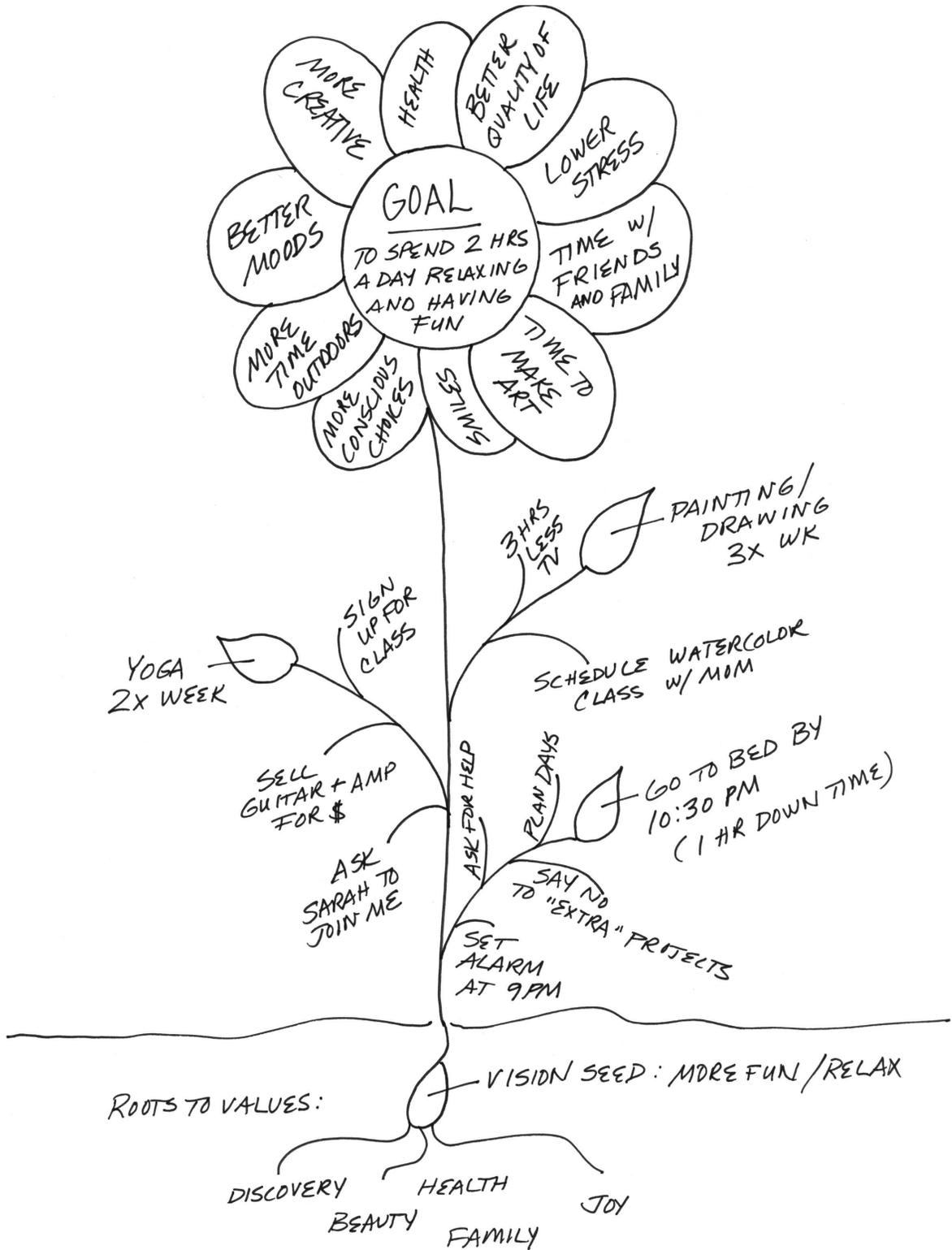
- Goals are the “commitment and action” phase of the change cycle. Working toward goals helps you accomplish things, and it also helps you discover a great deal about yourself — your priorities, patterns and so on.
- Goals are waypoints toward a larger vision that is pulling you into your chosen future. If a vision is a picture of what you’d like to see happen, **goals and action planning describe your best thoughts on how you can participate in making your vision a reality.**
- Manifesting your vision for your ideal life may require you to fulfill multiple desired outcomes (objectives) in various life areas (home, career, health, finances, etc.).
- Each desired outcome (e.g., “to have a meaningful, satisfying career” or “to enjoy more financial abundance” or “to be in a happy romantic relationship”) may call for the achievement of several distinct, well-defined goals, each with its own detailed action plan.
- Initially, it’s best to work on one goal at a time. As you gain confidence, skill and momentum, you may be able to handle several simultaneously.
- Conventional wisdom says that most successful goals are defined in S.M.A.R.T. terms:
 - Specific
 - Measurable
 - Action-oriented and accountable
 - Realistic
 - Time-focused
- The best way to make steady progress toward a goal is by developing and following a well-designed **action plan** that supports it. Action plans define known action steps and tasks, including the obtaining of necessary resources, skills and support, setting healthy boundaries and establishing workarounds for areas of challenge. These individual action steps are like “mini-goals.”
- The best action plans engage you in a process of continuous **assessment, commitment, feedback and follow-through**. They ask you to do what you know you need to do now, and to adjust your plan as you learn more. As long as you keep returning to this cycle, you are making progress toward your goal. Every time you complete the cycle, you get stronger and smarter. Accomplishing your goal becomes easier and more fun!

CULTIVATING YOUR GOALS



The goals that take us toward our vision are seeded by our desires and are fueled and nourished by our values. Goals are most successfully pursued when supported by an action plan. That plan may be composed of various tasks and tactics, including strategies for overcoming obstacles, setting boundaries and seeking necessary resources and support. As our goals are achieved, they flower into rewards consistent with our vision (along with some surprise rewards we might never have imagined!).

A SAMPLE GOAL



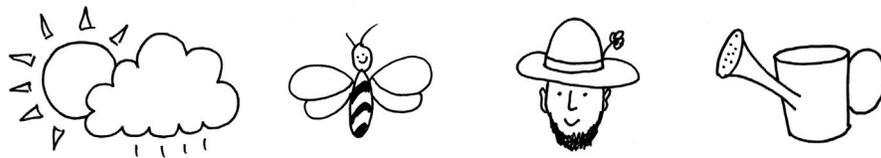
SUPPORTS, OBSTACLES AND BOUNDARIES

In the course of developing our action plan, it is wise to consider the range of influences and factors that are likely to come into play. This includes both the supportive and helpful resources at our disposal as well as potential obstacles that could block, delay or otherwise complicate our progress.

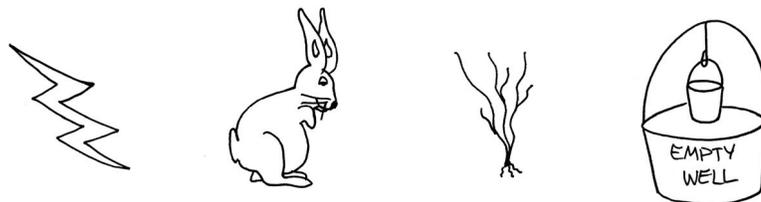
It can help to think about this in metaphorical terms: Imagine that you are planning to grow your goal flowers in a garden (the territory of your current life). What forces would be working for and against these flowers' healthy growth? What skills and resources could you draw on to provide your flowers with adequate water, sunshine, fertilization and other supports? What could you do to protect your flower from unwanted weeds, pests and other obstacles?

Consider the images below, what they might represent in your own life, and how they might have an impact on a goal under cultivation. If you like, add additional images and metaphors of your own. What are your most useful and powerful resources for help and support? Your most troublesome drains and pests? Your most-needed boundaries and protections?

Supports and Allies



Obstacles and Challenges



Boundaries and Protections

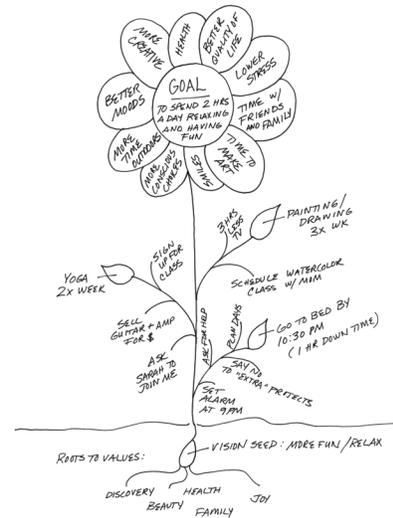


GOAL-CRAFTING AND ACTION-PLANNING

Your assignment is to begin developing one goal flower in the service of a selected vision or desire. Use the sample provided to help get you started.

You don't have to make your flower look a certain way, and it might not end up fitting neatly on one sheet of paper. That's OK!

The point of the illustration is simply to model the relationship between vision, goal, action mapping, and so on. Feel free to create a larger more detailed drawing, or to jot additional details about your goal and action plan on separate pieces of paper. You might take one branch or leaf and expand it on a separate page or pages.



Similarly, the illustrations of obstacles, supports and boundaries are there just to get you thinking about equivalent influences in your own life.

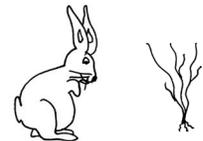
For example:



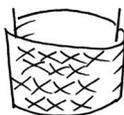
Who are your "wise gardeners," or sources of trusted advice and insight? What skills and support systems do you need? Are there aspects of your goal that will require outside expertise?



Where are the "weeds" showing up in your life? Who are the "rabbits?"



Are any of your energetic or financial "wells" running on empty? Are there boundaries you need to set?



Where do you need to wear "gloves," erect a "fence," or post a "keep out" sign in order to protect yourself and your priorities?



Once you've given some thought to these questions on the previous page, use your insights to develop and enhance your action plan, building in key steps and to-dos as you go. If you get stuck, come back to this guide.

In developing your goal and action plan, consider the following suggestions:

Relate your goal to your vision and values . . .

- What aspect of my vision am I most energized to claim and incorporate into my life now? What are the key components or essential themes of my vision? What change is calling out to be addressed first?
- What do I get by planting and nurturing this vision seed? What specific rewards do I hope to enjoy? How might my sense of self be different when I accomplish this?
- What goal has the most power to move me forward? Is that goal consistent with my values? Which ones, and how?

Define your goal in SMART terms . . .

- Choose a goal that feels challenging, meaningful and in the service of your vision. Make it . . .

Specific: Can you describe it succinctly in terms a stranger could understand? Can you order it from “the happiness catalog” without risk of getting the wrong thing? Describe in concrete terms how your life is different once this goal is achieved. Try: “I’ll know I’ve been successful in this goal when ... and I’ll know I’ve made real progress toward this goal when ...”

Measurable: Can you put a number on it somehow? Hours, dollars, quantity of pushups/pages/trips to the gym? Percentage change?

Action-oriented: What will you be doing differently in terms of choices, time or behavior, to achieve this goal? What will you be doing differently after you achieve it? Do you know what steps you’ll need to take first? Can you define your goal in terms of action RATHER than outcome?

Realistic: Is it challenging but not overwhelming and within your control? Are you willing to make the efforts and sacrifices necessary to achieve it? Can you pare it down to something more essential and doable? Something you are 99.9% confident you *can* accomplish?

Time-focused: By when will you achieve this goal? How much time will you be spending to achieve it? When? Where will that time come from?

- Don’t worry too much about getting the “perfect goal.” You can refine it over time. Also, remember that this first goal is mostly about working through the process and understanding the moving parts. Pursuing this goal will help you develop the skills, insight and experience you need to successfully address other goals, and to work on multiple goals simultaneously.

Build out your action plan ...

Use the stem of your flower to clarify key steps and sub-steps you'll need to take in accomplishing your goal. Use as many branches, leaves and stems as you need to develop a detailed plan. Consider:

- Necessary actions you are willing to take toward your current goal during the next few days, weeks or months.
- Additional actions you might be willing to take later.
- Steps you are energized to take now (as soon as today).
- Sources of support you can engage, now and in the near future:
 - People, contacts
 - Information, skills, expertise, learning
 - Material resources and environments
 - Personal strengths you can call on
 - Values you can call on
- Some potential obstacles you might encounter:
 - Internal (fears, boundaries, beliefs, distractions, energy deficits)
 - External (time, money, other people, environmental influences)
- What are some strategies and resources you can use in eliminating, overcoming or working around each of these potential obstacles?
- What measures or benchmarks will you use to track your progress?

Build in accountability . . .

- At what points will you evaluate your progress (and harvest your learning)? Set some specific dates, based on your goal's time horizon. Consider committing to your start date, then scheduling check-ins one week from that date, one month into your plan, and monthly thereafter. Also note a date midway to your intended completion date, three-quarters of the way, and, naturally, your actual intended completion date:

Start: _____

One week: _____

One month: _____

Monthly: _____

Midway: _____

Three-quarters: _____

Done: _____

List these checkpoints on your calendar. Set advance reminder alarms, if possible. Ask a friend or coach to check in with you and hold you accountable on these dates.

In addition to defining major checkpoints, consider marking down weekly check-in dates to help you track your progress and to keep your goals top of mind. Doing quick daily check-ins each morning or evening can also be helpful — the more you invest in your goal flower, the more powerful it becomes.

At each checkpoint, make some journal notes about where you're having success, where you're running into challenges, and what strategies are working/not working for you.

Ask: What steps or course-corrective action will I take if I sense I am off course, or I am not where I committed to being for my midway checkpoint? (This should not be something you see as a "punishment," but rather a supportive device that helps you regain lost ground, correct course or reconnect with your goal. Be a compassionate friend to yourself!)

Ask: What reward will I commit to giving myself as a celebration of my success? As a celebration of progress and learning?

Ask: What's one thing I can do in keeping with my goal — this month, this week, today?

Use the information you've uncovered in responding to these questions in order to populate your goal flower's vision seed, SMART definition, reward petals and the stems and leaves of your action plan. You can keep coming back to revise and add to your flower over time.

As you make progress on this goal, you'll be inspired to start others. Over time, as your energy and goal-crafting skills evolve, you'll be able to work on several goals and objectives at once. For now, though, strive to keep it simple.

