

# LifeMapping: Identifying goals and actions

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“A vision without a task is but a dream; a task without a vision is but drudgery; a vision and a task is the hope of the world.”

-- From a church in Sussex, England, ca. 1730. Quoted by David Allen in *Getting Things Done*.

## Introduction

The goal-setting procedure put forth here is to identify the goals that matter to you and then to organize the actions that will put you on the path toward achieving these goals. Goal setting for your time on earth is daunting. Yet it isn't difficult and is essential if you want to lead a purpose-driven life that you have chosen with intention. I believe it leads to fewer regrets for paths not taken and greater satisfaction and confidence in the paths that we do take. All of our life-paths are crooked and branching. Goal-setting and periodic reviews of those goals allow for course-corrections along the way.

I call this goal-setting procedure “LifeMapping” because I love maps and they provide an apt metaphor. Maps show you where you are and all the places (goals) you could visit in your life. With your LifeMap in hand, you embark on a path to follow towards your most important goals, recognizing that you won't get to every place on the map. You must prioritize. There are many forks in the road and the map can help you choose which path to take at each juncture. Choosing paths with intention leads to fewer regrets, because, even if the path turns out to be painful or unproductive, at least you know it was your choice. Taking personal responsibility for your choices is essential for happiness. You are in charge and no one else. Believing yourself to be a victim is crippling and self-insulting. We've all got flaws and disabilities of some sort. Move forward anyway, at your own pace, on your own path. Dream anyway.

Not everyone needs LifeMapping. There are many perfectly happy people who are helping their neighbors and making the world a better place, without ever writing down their goals. I just know that I need it. As a scientist, I want to lay out all the options (multiple working hypotheses), choose from among them (prioritize), gather new data to test predictions, and create course-corrections when needed.

LifeMaps are plans, and all plans are imperfect. As has been ascribed to Eisenhower and Churchill: “All plans are worthless. However, planning is essential.” What this means is, planning prepares you for what lies ahead, which is never exactly what you plan for. A LifeMap lays out a network of options that gives you the resilience to handle unexpected obstacles and the flexibility to take advantage of unanticipated opportunities when they arise. The process aims to identify the big things you care about and want to do in life, and the small steps it takes to get from here to there.

I know that LifeMapping seems enormously self-centered. All of the focus appears to be on “me” and what “I” can get out of life. Suspend your cynicism long enough to listen to Viktor Frankl, Holocaust survivor: “In the end, it did not really matter what we expected from life, but rather what life expected from us.” You're not just figuring out what you can *get from* the world, but also what you can *give to* the world. They might just be the same thing.

## Procedure – Basics

I've broken the process into three main components:



- I. Why: Identify what really matters. What do you really value?
- II. What: What do you want to be, do, and have?
- III. How: Integrate your goals into a unified structure. What steps do you need to take to achieve them?

I. Start with **Why**. Take a step back, look at the big picture of your life, and identify your values and the things you really care about. Here we're looking for categories of things you care about (family, job, fitness, travel, social service, etc.) that you can fit your goals into. Our purpose here is to make sure you don't forget about some big, important area of your life before you start listing your goals. We'll start with just a list of these categories, and that may be enough for many people. An additional step (which I find essential for the way I think) is to structure this list into a framework or outline that will lend some order to the goals you're going to articulate and pursue.

II. The second component (**What**) is a mind-dump of your goals and dreams for three time frames: long-term (lifetime), medium-term (three years), and short-term (this year). A mind-dump is just a 10-minute exercise where you list every personal goal you can think of, off the top of your head. The purpose is to get an intuitive, gut-level assessment of your goals, unconstrained by anything that might inhibit your response. The goals do not have to be realistic; you can fix that later. A series of questions accompany the mind-dumps just to inspire broader thought, to spur adding goals to your list. For each goal, you'll assign a relative priority on a three-point scale: A (highest), B, or C (lowest). Yes, all the goals are important. But some are more important than others.

III. The third component (**How**) has two steps. How-step 1 is to **Integrate** all of your goals into a single worksheet, so you can see how they fit together. You'll copy your long-term, medium-term, and short-term goals onto the same worksheet (perhaps just the A-priority goals), and you'll align the medium-term goals with their parent long-term goals, and your short-term goals with their parent medium-term goals. If for some reason you have short-term or medium-term goals without a corresponding long-term goal, you'll need to add that long-term goal. Ideally, everything you do should contribute to your dreams (i.e., your long-term goals).

How-step 2 is to **Actualize** each short-term goal by creating concrete steps to take. This is where the rubber meets the road. Up to this point, we've been dreaming, organizing, and prioritizing. But how do we actually get stuff done? Everything gets done by breaking a larger task into small steps that are taken one at a time. Whatever the goal, a key result (KR) is a something that can be demonstrably accomplished towards achieving the goal. Definitions get a little muddy when broken down into fine granularity, but I think of goals as being aspirational (e.g., to become a good sailor), KRs as mini-goals or milestones (earn certification to charter sail boats, skipper your own sailing trip), and tasks are undertaken to achieve the KRs (read sailing introductory texts, practice sailing with friends, take sailing lessons). Your challenge is to translate your goals into a series of KRs, each of which is achieved by a sequence of tasks. Each task should be small enough to not be daunting. Each KR should feel like a real accomplishment to be proud of.

Whether you achieve a goal or simply move toward it depends on how you stated it. While there may be some value in goals that are only aspirational and never fully realized (to be the best sailor I can be), I think there is clearer value in creating realistic goals that can actually be achieved. Mold your aspirations into real things you can do and accomplish, things you can be proud of. Further, while it's good to take pride in "mastering" a task, remember that you don't have to master everything. It's also highly admirable to adopt a beginner's frame of mind and to subject yourself to a wide variety of different experiences. Perfectionists miss out on much in life because of their fear of being imperfect in front of others (ask me how I know this...). I believe overall it's worthy to be an imperfect jack of all trades *and* a master of those very few that you have chosen with intention.

Finally, in scheduling the tasks needed to accomplish KRs and their larger goals, consider the Eisenhower matrix. This is a 2x2 matrix of tasks categorized by urgency and importance. Tasks that are (a) urgent and important should be done immediately, (b) not urgent but important should be scheduled, (c) urgent and not important should be delegated if possible, and (d) not urgent and not important should be ignored or deleted. Life seems to throw a lot of (apparently) urgent stuff at us. LifeMapping helps us identify the important stuff so it doesn't get lost or pushed aside, especially the (b) important-but-not-urgent items. You only have one limited life, and so the most important stuff is all ultimately urgent. Start now in small steps so you don't miss out being who you want to be, and doing what you want to do.

## Procedure – Specifics

- I. Why: Identify what really matters. What do you really value?
  - A. Begin at the end: what do you want people to say about you at your memorial service?
  - B. If you had only 6 months to live, in perfect health, where would you go, and what would you do?
  - C. What are your strengths and weaknesses?
  - D. What circumstances make you feel best about yourself?
  - E. What ~5-10 things do you value the most in life?**
    - i. In other words, *what are the main categories that your goals fit into?*
  - F. How can you structure these categories?**
    - i. As in nearly all creative endeavors (intellectual or otherwise) -- start with a list (I.E above), and then add structure to it. How can you organize these categories into a framework that will help achieve your goals? This framework is the skeleton, and your goals are the flesh.
    - ii. The framework itself is not about setting priorities -- it's merely creating slots for your goals to fit into. We'll prioritize goals within each category later.
    - iii. This framework is subjective as to how you see the world. I see the world structured as hierarchical levels, as in an outline. I've included an example of my 3-level outline that comprises my categories that my goals can fit into, along with my other duties in life.
    - iv. If you're unsure about this step, you can skip it for now. Or, perhaps just temporarily accept my Level 1 and (perhaps) Level 2 categories. Perhaps they are generally applicable to most people.
- II. What: What do you want to be, do, and have?
  - A. Long-term: Inventory your dreams / goals
    - i. 10-minute brain dump of lifetime dreams / goals
      - a) These may be aspirational goals (things dreamed of, but difficult to clearly define or achieve) as well concrete goals
    - ii. Answer the following questions, and add to your list if new things arise:
      - a) What would you do if money were no object?
      - b) What have you always wanted to do but were afraid to try?
      - c) What one great thing would you do, if you knew you could not fail?
      - d) Name your heroes. What part of their lives would you live?
        - Fictional (2-4)
        - Real (2-4)
    - iii. Prioritize
      - a) No list is complete unless you prioritize the items. This is difficult and subjective, and will change over time. I know all these items are important to you. After all, that's why you listed them. But some items are more important than others. For now, choose an A, B, or C level of prioritization:
        - A = top priority
        - B = medium priority
        - C = lower priority (at least for now)

- B. Medium-term: What are your goals over the next three years?
- i. 10-minute brain dump
  - ii. Where do you want to be, personally and professionally, after three years?
    - a) These should be more concrete goals than the long-term goals
    - b) While many of these goals will be “personal,” (i.e., just for you), don’t forget about goals for your profession, family, and home.
  - iii. Prioritize
    - a) Assign each goal with an A, B, or C priority.
- C. Short-term: What do I want to get done this year?
- i. 10-minute brain dump
    - a) These should be even more concrete than medium-term goals
    - b) Again, include goals for you profession, family, and home as appropriate.
  - ii. Prioritize -- assign an A, B, or C priority to each short-term goal.
- III. How *(see III. How - Example worksheet to get a feel for what we’re trying to do here)*
- A. How, step 1: **Integrate** Goals
- i. Add categories
    - a) If you created a numbered outline of the things that matter to you (step I.F above), copy & paste it into columns A-C of the III. How worksheet. See example worksheet.
      - I’m assuming you have 3 levels, but perhaps you have fewer. If you have more, add columns (E, F, G, etc.) as needed (column D is just a visual spacer).
    - b) The great advantage of having a numbered outline is that you can always recover the structure by doing a three-key sort in Excel (Level 1 > Level 2 > Level 3).
    - c) You will eventually want this structure if you continue beyond this LifeMap tool to the TaskPlan tool, which will generate weekly task lists.
  - ii. Add Long-term (L-T) goals
    - a) Decide which priority goals to include
      - You might just start with the A-priority goals to keep things simple.
      - Include the B and C goals if you want to be more comprehensive.
    - b) Copy & paste L-T goals into worksheet III.
      - You’ll probably need to do this one goal at a time, manually. In Excel, choose View > New Window to display both II.A and III worksheets at the same time.
      - For each goal, figure out which category it fits into, and paste it into column F
      - Paste its priority (A, B, or C) into column E. This column will allow you to sort by priority.
      - If you have more than one L-T goal per category, then insert a row, copy the category levels, and add the goal and its priority to that line.
  - iii. Add Medium-term (M-T) goals
    - a) Likewise, you’ll need to do these goals manually, one at a time. Choose View > New Window to show both your II.B and III worksheets at the same time.
    - b) Try to find an appropriate L-T goal that your M-T goal should fit under, and copy it to the same line, in column G.
    - c) If there is no relevant L-T term goal, then you’ll need to insert a new row and create a new L-T goal. (Make sure to copy the categories to the new row, too.)
  - iv. Add Short-term (S-T) goals
    - a) Follow the same procedure as for the M-T goals.
    - b) Seek out a related M-T goal to fit your S-T goal beside, in column H.
    - c) It may be that there is no related M-T goal (although consider if you need to add one). But there should always be a related L-T goal. If not, add another, as needed, by inserting a new row.
  - v. Finally, look over the worksheet to see if there are any needed modifications:
    - a) Do you need to add some goals to fill some gaps?
    - b) Do you need to add any new categories?

- vi. Power of sorting
  - a) Recognize that the power of this structure is that if you have your categories appropriately numbered, and if you have L-T priorities entered, and if you have a header row (row 6) with no gaps, and no blank rows in your data set --
  - b) Then you can sort this data set by Priority and Category as needed.
- vii. Step back and pat yourself on the back. This was a fairly long and probably confusing process.
- B. How, step 2: **Actionize** these goals by breaking them down into clearly achievable **key results** (KRs), which are accomplished by executing **actions**, namely, **tasks** and **steps**
  - i. As needed, if possible, re-state your medium- and short-term goals as “key results” (KRs). Virtually all of your S-T goals should be KRs.
    - a) **A KR is something that can be demonstrably achieved.** It’s fine to leave your long-term, lifetime goals as aspirational states of being, e.g., “to be a good sailor”. A medium-term KR could be “earn a certificate to charter a sailboat.” Short-term KRs could be “read a Sailing 101 book”, and “identify a week-long sailing course I could take.”
    - b) **A KR is something that takes a week or longer to do.**
      - This is my arbitrary distinction; ignore it as needed. It won’t fit all cases.
    - c) Add KRs (S-T goals) as needed in new rows, below your M-T and L-T goals, as milestones in achieving those longer-term goals.
    - d) **Set a target completion date for the top five KRs.** When can you accomplish this KR? This may be a bit uncomfortable. Be as realistic as you can; unrealistic expectations lead to disappointment.
      - In a perfect world, we’d have target dates for all KRs, and we’d achieve them ahead of schedule. The world’s not perfect. If you complete these five KRs, then start on the next five.
  - ii. For each KR, add the actions (Tasks & Steps) needed to accomplish it
    - a) **A Task is something that takes a week or less.** (*Arbitrary; change if you want.*)
    - b) **A Step is something that takes a day or less.** (*Arbitrary; change if you want.*) Pick a first Step for each Task to get started.
- C. Ah, finally -- you have a list of concrete, achievable actions that will lead you, step by step, to accomplishing your dreams. To fit them into the schedule of your daily life, your next step is to explore the **TaskPlan method and template**.

## Sources and Further Information

The above method is a combination of information from several influential sources:

Lakein, Alan. 1973. How to Get Control of Your Time and Your Life. David McKay Co., Inc., New York. Signet paperback printing. 160 p. This is a short, simple, and clear book. Highly recommended.

Tracy, Brian. The Phoenix Seminar: Your “How-to” for everyday success. This was a series of cassette tapes I listened to in the late 1980s as I worked on my dissertation. The tapes generally promote positive thinking and personal responsibility. See <http://www.phoenixseminar.com/> for the current version.

“OKR” stands for objectives and key results, a management method generally ascribed to Andrew Grove at Intel, and then spread to Google by John Doerr in 1999. I use the words “goal” and “objective” interchangeably. See <https://en.wikipedia.org/wiki/OKR>

Frankl, Viktor. 1946. Man’s Search for Meaning. Beacon Press.

MacAskill, William. 2015. Doing Good Better. Penguin Random House, New York. I haven’t actually read this book, but I’ve listened to podcasts with MacAskill. Here are some links to MacAskill’s TED talk

([https://www.ted.com/talks/will\\_macaskill\\_what\\_are\\_the\\_most\\_important\\_moral\\_problems\\_of\\_our\\_time?language=en](https://www.ted.com/talks/will_macaskill_what_are_the_most_important_moral_problems_of_our_time?language=en)) and web pages (<https://www.effectivealtruism.org/> and <https://80000hours.org/>).