

The Modern Editor Podcast – Episode 20: Goal-Setting Part 2: Strategy and Process

Tara Whitaker: [0:03] Welcome to *The Modern Editor Podcast*, where we talk about all things editing and what it's like to run an editorial business in today's world. I'm your host, Tara Whitaker. Let's get to it.

Tara Whitaker: [0:18] Hello, welcome to today's episode. Today we are going to be talking about goal-setting. And now at the time of this recording, it's February 2023. So, we're a little bit into the new year, but that's okay because we can goal-set anytime, right? And what we're going to talk about applies to goals as a whole, like, as a whole process. And so, it's not just something that can be done in December or January. It's a little more often than that, and we're gonna get to that, get into that more here in a bit. And I know goal-setting can be a challenge for some. It can be maybe even boring or not so fun. And I want to see if I can help change that; make it easier for you and dare I say, make it fun? Which is how it is for me now, but it wasn't like that in the past. So, I'm going to share how I goal-set—my process, the time frame that I do my goal-setting in, and then how I break down my goal-setting. And we're going to talk about what's more important than hitting or accomplishing your goals, which I know might be a little bit of a shocker. But it's a very important point. And now if you haven't listened to Episode 17, about how I reflect on my goals and priorities in the past, you know, month or quarter or year, go give that a listen before diving into this episode. It'll really help you and set you up for goal-setting. So, let's get into it.

Tara Whitaker: [1:51] Now, the first thing I want to mention, and it's honestly the most important thing, and the thing I want you to take away from this episode—your worth is not tied to your accomplishment or non-accomplishment of your goals. You are a worthy, full, amazing, wonderful individual, regardless of whether or not you achieve your goals. Full stop. That's the message. Okay? There is always going to be something to improve upon or aspire to or change or accomplish. That's always going to happen. And the important part is what we learn along the way. And that journey that we take to hitting those goals. Yes, that might be a little woo-woo. We'll embrace it. But it's true. And it took me a very long time to realize that that hamster wheel of goal-setting is not the vibe I wanted in my life. I'm all for constantly learning. I'm all for education and improving skills and mindset and all of that. But where I learned the most is what I do every day, how I live my life every day, what I do on a day-to-day basis that takes me toward that goal. The accomplishment of the goal is just icing on the cake for me now. And that is a very difficult mindset shift to have, at least it was for me. You know, we are taught a lot of the times to, you know, make the goal, hit the goal, do what it takes to hit the goal. And along the way, we let our boundaries slip and we don't stay in alignment with things that are important to us. And we get to the goal, and we accomplish it, and then it's like, okay, now what? That wasn't, you know, there was no big defining moment of hitting that goal other than hitting the goal. Okay, now do I just make another goal and continue the rat race? No. But that's how a lot of us were taught how to do goal-setting. So that's why we're going to talk about this today and why taking a different approach for me is where the process really, really helps.

Tara Whitaker: [4:08] So, I want to challenge you to do the following. You're going to release any pressure you have either internally or from anybody on the outside of putting on yourself that you have to accomplish these goals. We're going to release any of that pressure. We're going to release any thoughts of judgment, or negative self-talk or anything that does not serve us. And then we're going to reframe, when applicable, that not hitting a goal might simply mean it just wasn't a priority. And we're going to talk about that later. Okay? So, you are worthy. The accomplishment of your goals does not make you any better or worse than you were before. It's just a milestone. It's the journey that matters. Okay.

Tara Whitaker: [4:56] Now let's get into goal-setting, the process. Now, the whole theme of this is going to be taking big-picture things or setting big-picture items, and then we're going to drill down into manageable chunks. So, we're gonna start big, go small. Now, I have found that, for some things, goal-setting by the year is most helpful, which I will tell you about in a little bit. And then after that, by the quarter works best for me. It's enough time to really dig into bigger projects and get things accomplished, but it's not so far ahead in the future that it's hard to grasp. Plus, let's be honest, life happens. And for me, planning out any further than three months, it just doesn't work. I can't grasp it. Things change too much. Something that, you know, I planned in January for June, inevitably is going to get thrown off because life is gonna happen between January and June. So, I take it by the quarter. My advice is to test it out and see what works for you. Maybe it's a month, maybe it's a quarter like me, maybe it's every six months, maybe it's a year. But I would, I would try a quarter first. It's a really good chunk of time that seems to work best for a lot of people. But again, do what works for you.

Tara Whitaker: [6:17] And I will say that, for this process, I write everything out by hand. Little notebook, pen and paper. Let's be honest, I have like 400 notebooks, sticky notes, pads of paper, big sheets of paper, like. I do it all by hand, though. And then when I get down into my actual goals, then I transfer that into my planner, which is again, handwritten, but then in my project management software, so it's electronic as well. So now, once you pick your time frame, then I answer some big questions. And I talk more about this inside the Freelance Editors Club, but I'll briefly cover them here, so you just have the whole entire view of my process.

Tara Whitaker: [7:02] So, before we get really into goal-setting, we talk about your purpose, your core values, and your big life goals. Now, obviously, those are really big questions, so that's why we dig more into them inside the club. But briefly, your purpose is essentially what lights you up. Why do you do what you do? Your core values are what you hold dear and what is important to you. And then your big life goals, you know, those are things like you want to get out of debt, or you want to retire at a certain age, or you want to travel the world with your family, whatever those may be. Whatever they are, though, write them down. Write all of those down because those are going to be our touch points along the goal-setting process.

Tara Whitaker: [7:47] Now, we're going to dig into what I do for the year. And honestly, I do this for the year, but I think I might do it bi-yearly. I always forget. Twice a year. We'll go twice a year, like January and June. But I use a graphic called the Wheel of Life. And

you can google this, there's blank ones out there. And you can determine what you want to include on this Wheel of Life. But it basically looks like a pie chart. And you put categories within each piece of pie. And then you rate them from 1 to 10 on the importance to you for the upcoming time frame. So, like I said, I do this for the year. So some of the categories could be things like finances, relationships, spirituality, community contribution, personal development, those sorts of things. But it's a great way to see visually an overall picture of your priorities, because unfortunately, we can't make all of those a priority, right? They're going to differ, you know, you're going to focus more on a few and not so much on others. And that's going to change, right? Maybe one year, you really want to get your finances in line. That's going to be a bigger priority than say, personal development. Or maybe you want to focus more on spirituality this year, and your business isn't as much of a priority, you know. So, this is just one of those high-level, big-picture exercises that really helps just give that overall feeling.

Tara Whitaker: [9:19] So, after the Wheel of Life, I answer some questions that I've come up with that really help me home in on my mindset. And I'm going to cover just a few of those here. I have about ten, I think. But the first one is, How do I want to feel this year? What am I actually capable of working toward this year? That's a really good one, and makes you really look into how much time do you have. Do you have big events happening this year? Do you have parties you have to plan or are you attending conferences, or, you know, are family members having surgeries, you know, anything that would take away from time toward your goals? You've got to be realistic about that, right? What am I willing to do or not do to achieve my goals? And this is where boundaries comes into play, you know. Am I willing to work every night after the kids go to bed? Am I willing to wake up early in the morning or work on the weekends? Those sorts of questions are really going to help both set your boundaries, and, again, set the tone for how you're going to achieve these goals. How much risk do I want to take? And that could be financial risk and/or personal risk, you know. It could be, do I want to be more visible on social media? That's risky, right? Any, anything that puts our face out there, or our message or our voice. That can be risky. How much do you want? How much risk do you want to take? And then finally, Who has my back? Whose back do I have? You know, we're all about community here at The Modern Editor Podcast. So, who are you going to help this year? And who are you going to lean on for support to help you accomplish these goals?

Tara Whitaker: [11:03] All right, so now we've got Wheel of Life, we've got our vibe going for the year, set our priorities, now it's time for me to do a massive brain dump. And I mean, everything. Every little thing that is in my head that I want to do goes on a piece of paper. It doesn't matter how big or small, weird, random, everything goes. And this can take multiple pieces of paper. And I handwrite it all out. And I spend a lot of time on it. And I spend time over the course of, I don't know, maybe it took a few days this year. Because, of course, I keep remembering things, right? But do as much as you can; get it all out of your head, okay. Then you're going to take that massive list, and for each thing on that list, you're going to analyze it by asking yourself these questions. Why is this on my list? Does it even need to be on here? You know, sometimes we have these things in our head that just stick there, but maybe the opportunity has passed for that thing, or it's no longer relevant to what we're doing. Does it even need to be on

there? If it doesn't, you know, get rid of it. If it does, I ask myself, can it be knocked out quickly, because I have a lot of little crumbs that accumulate. And if you don't know what I mean by crumbs, head back to Episode 5, where I talk about a CEO day and working on versus in your business. But sometimes a lot of the stuff in my head could be knocked out in like a half a day, if I just put them all together and do them all at once. So that's an easy way to get rid of all those little things.

Tara Whitaker: [12:43] Then you're going to ask yourself if that thing in your head aligns with your purpose and your values and your big life goals and your Wheel of Life. That's why we do those big things, right? We do the big, overarching things so that we have that to refer back to for the littler things. And then, should it be a priority for this time frame for this year, for this quarter, whatever you choose? Because it could be something you focus on maybe in the third quarter, just not the first quarter. And then you're going to kind of categorize those, right. So, if it's a priority this year, great, but maybe it goes to the side for a separate quarter. We're going to assume we're starting at quarter one here, by the way. So now that you've analyzed all of that stuff on your brain dump, then you're going to separate it by your time frames. So, we're just going to go with quarter. So Q1, Q2, Q3, Q4 – three months in each quarter.

Tara Whitaker: [13:39] Now, I want you to set one to three goals for each month of the quarter. So that means that for each quarter, you're going to have between three and nine goals. That's plenty. And of course, it depends on how big those goals are, right? If it's a really big goal, maybe you only have one goal for the whole quarter. You know, it just depends. But the point of this is that you can't focus on 48 things each month. You have to narrow it down and be realistic about what you can tackle and accomplish. So, no more than one to three goals for each month of that quarter. Okay, write them down, or type them out.

Tara Whitaker: [14:21] And then you're going to commit to those goals. If you need to, write it out. Tell yourself why you care about this goal. Why is it on your list? How are you going to accomplish it? And then you can stop right there if you want. That might be drilled down far enough for you. If not, you can go down even deeper. You can put down what do you need to do each week of that month to accomplish the goal. You could even go by the day. Some of that might be too in the weeds for some of you, but others you might really like that level of detail. So, to give you an example, let's say that you want to launch a podcast and you say okay, I'm going to launch a podcast in February, or let's say March 1. Now, that might be enough for you, you might know from there, okay, I have February to do this. If not, you can go by the week. So, let's say week one of February, you're going to come up with a podcast title, create the cover art graphic, and decide if you're going to do solo casts or if you're going to have people on for guest interviews. There's week one. Week two, you need to schedule out the episodes, do you need to interview anyone, are you going to do these on your own, maybe you figure out the technology portion of the podcast. Then week three, maybe you have the guest interviews, you record the podcast, you edit them, you create all the graphics for them. And then week four, you start promoting. That's probably not a realistic timeline, but for example's sake, we're gonna go with that.

Tara Whitaker: [16:01] So that's how you can do it by the week. And then like I said, you could go down even further by the day. And then at the end of the month, or the end of the quarter (again, whichever you prefer), we're going to reflect. We're going back to Episode 17, with the reflection, because, again, we could get on this hamster wheel and without stopping and pausing and reflecting, it's just going to keep circling and going, and we're not going to be happy. So, the questions I asked myself are, okay, what—Was I able to accomplish my goals? Yes, or no? Why? Were they too big? Were they too small? Did life happen? Did the kids get sick? Did I get sick? You know, whatever the case may be. And then did my goal stay in alignment with my big goals, my purpose, my core values, and if they didn't, why? So, this is where I mentioned at the beginning about making sure that your goals are in alignment, and if you don't accomplish them, there's a reason. That reason could be that the goal just wasn't a true priority for you. You might have thought it was, but then once you got going, you realized it wasn't a priority, or it wasn't in alignment with something that you wanted to accomplish on a bigger scale. That's not a failure. That's a lesson learned.

Tara Whitaker: [17:20] So that's what I mean by saying that the important part of this whole process is the journey and what you learn along the way, not necessarily hitting the goal. Because if you hit the goal, and it was completely out of alignment, or wasn't a true priority, what did you actually accomplish? Are you better off for accomplishing the goal? Or could you have pivoted, readjusted your priorities, focused on something that was in alignment? And even if you didn't hit that, that would be more in line with what you're actually looking to accomplish, right? Ticking boxes off saying I accomplished the goal is not what we're looking for here. Anybody can do that. But what does that actually accomplish? Who do you actually become by doing that? How do you live your days, your weeks, your months by just dictating if you can check off a goal accomplished or not? That's where the lesson is. That's where the journey comes into play. I know, woo-woo, but go with it. It's a vibe. What you learn. Who you become along the way.

Tara Whitaker: [18:30] Now to go further into reflection, what did you learn about yourself? Again, this is where we're learning about what we are becoming every day. It's not about the arbitrary goal. It's about us and who we are. And then the last question is, What would you like to do differently in the future? Maybe you need to reflect more often, maybe you need to check back with yourself on if the goals are in alignment. Maybe you need to set smaller goals. Or maybe they're bigger goals. Maybe you need to take more risk, whatever the case may be. But these questions really help you reflect back on what worked, what didn't, and most importantly, what you learned along the way.

Tara Whitaker: [19:11] And then we take this whole process, and we rinse and repeat. So, for whatever time frame you've decided to work on, monthly, quarterly, what have you, keep doing it. You revisit your Wheel of Life, revisit your purpose and your values and your goals, your life goals and your priorities as often as you need to. And it's okay if they change. They can absolutely change. There's nothing wrong about that. There's no failure in that. If anything, that's probably better than sticking to something you did months ago that still doesn't apply. We're all humans. We all have things going on.

Things shift. Things happen. It's okay to change our minds. It's okay to change our direction.

Tara Whitaker: [19:53] That's it. That's goal-setting. That's how I approach it. I hope that's helpful for you. I hope that it makes the whole process seem a little less daunting, maybe even a little fun. Like I said, it definitely used to be a slog for me, but now that I found a method that works, I really look forward to doing it on a regular basis. And I'm very excited about this upcoming year. So if you want to learn more about goal-setting, setting your boundaries, the core values, all of that good stuff, I'd love to have you inside the Freelance Editors Club. We talk about this all the time. You can check more details out at tarawhitaker.com/club. Or you can always email me with any questions at hello@tarawhitaker.com. And until next time, keep learning, keep growing, and know that you've got this.

Tara Whitaker: [20:41] Thank you so much for tuning into today's episode. If you enjoy *The Modern Editor Podcast*, I would be so grateful if you left us a review over on iTunes. And as always, you can head to tarawhitaker.com to connect with me and stay in touch. We'll chat again soon.