

Upgrade Program Goals Plan

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Introduction

This document is part of a series of upgrade plans for every [area](#) of your life. It's broadly designed for a single, middle-class, 30-something living in a major city in a developed country.

Please go to "File" > "Make a copy" and make a copy of it for yourself. Then fill it out section by section according to your particular needs and circumstances. Perhaps add sections or items, delete them, change the order, and so on.

Your aim should be to make the plan as applicable and useful to you as possible. You should not follow the plan blindly—think it through for yourself. For some people, they should skip essentially all of the deep planning and stick to the simplest possible versions. Just get something done and down on paper. "Perfect is the enemy of good" with goal setting, planning, and executing.

Note that this process might be challenging. You might need to teach yourself things you aren't very knowledgeable about yet. You might feel like you need to do preliminary work in a different life area first. That's okay. Figure out broadly what makes sense for you, operationalize that understanding as specific actions in the [Actions](#) section, and then do them.

If it feels overwhelming, just start with the parts you find most valuable and do what you can. Tackle the rest over time. It may also help to set aside a dedicated [day](#) to work exclusively on this by yourself or with friends. Or you may choose to enlist an [UP Coach](#) to co-design and execute this plan alongside you.

Epistemic Status

This is an overview of how confident the principal [author](#) is in this plan.

- Generally high confidence in plan
- Based on 30+ years of substantial personal attention to goals and 1,000+ hours supporting 100+ clients on their goals

Objectives

Decide what objectives you have with this plan and rank them in order of importance. Below are some sample objectives.

1. Achieve your life goals
 - a. Determine your life goals
 - b. Plan your life goals
2. Achieve your annual goals
 - a. Determine your annual goals

- b. Plan your life goals

Metrics

Decide what metrics you will use to evaluate the effectiveness of this plan. Also include the frequency in which you'll evaluate those metrics. For example, ad hoc, once, hourly, daily, weekly, monthly, quarterly, annually or per decade. Below are some sample metrics.

- Goals Rating: How would you rate your goal attainment, on a 1-10 scale?
- Annual Goal Attainment: What percentage of your annual goals did you reach?
- Upgradable Metrics¹
 - Holistic Flourishing Scale (HFS)
 - Total Well-being Adjusted Life Years (TWELLBYs)
 - Total Life Congruence (TLC)
 - Life Goal Value Attainment (LGVA)
 - Life Goal Attainment (LGA)

Values

List all of your relevant values and rank them in order of importance. Below are some sample values.

1. Goal attainment
2. Life congruence
3. Integrity
4. Focus

Value Analysis

List and then analyze all of the costs and benefits of this plan. Potentially also estimate expected value and/or return on investment. Below is a sample analysis.

- Time costs: 1 - 1,000 hours
- Financial costs: \$0 - \$1,000,000 dollars (e.g., staff, tools, equipment, supplies, etc.)
- Benefits: \$X in extremely large objective and subjective benefits (literally all of your values in life can be encapsulated by your goals)

¹ See [Upgradable Theory of Optimal Living](#).

Strategies

Decide on your high-level strategies for achieving your objectives. Below are some sample strategies.

Key People

- Do the work on your own
- Outsource some or most of the work to experts (e.g., coaches, performance psychologists, etc.)
- Outsource some or most of the work to assistants

Key Timings

- Make incremental progress every day until you reach your objectives
- Make progress as intensively as you can until you reach your objectives
- Make as much progress as you can over a set period (e.g., one month, six months or one year)

Actions

List the specific actions you will take to achieve your objectives. You should add these tasks to your project management system unless you are choosing to do them now. Below is an example sequence of actions you might take.

1. Describe your [mental model](#) of your goals
 - a. Create a visual representation from memory without referencing this plan or outside sources of information
 - b. Create a new visual representation after thoroughly studying this plan and any relevant sources of information²
 - c. Pay special attention to the improvements in the second version as incorporating those new insights may be crucial to the success of your plan
2. Finish every section of this plan, including the [assessments](#), [tools](#), and [resources](#) below
3. Set Life Goals through [UP Life Goals](#)
 - a. Do [UP Life Audit](#) to discover new goals
 - b. Do [UP Life Calculator](#) to rank goals
 - c. Create [UP Plan](#) for each Life Goal
2. Set Annual Goals through [UP Annual Goals Dashboard](#) or [UP Annual Goals](#)

² [Unique effects of setting goals on behavior change: Systematic review and meta-analysis](#)

- a. Create Annual Plan through [UP Annual Plan](#) or [UP Annual Goals Dashboard](#) every December
 - i. Execute Annual Plan starting in January
3. Create Goal Management System (e.g., [UP Life Plan](#), [UP Annual Goals Dashboard](#), [Asana](#), [Google Sheets](#), [Google Calendar](#), etc.), which is usually the same as, integrated with or connected to your [Project Management System](#)
 - a. Record Annual Goals in Goal Management System
 - b. Create Life Dashboard through [UP Life Dashboard](#) or [UP Simple Life Dashboard](#)
 - c. Do [UP Goal Predictions](#)
 - d. Review goals on a regular basis (e.g., daily, weekly, monthly, quarterly, every six months, annually, every five years, every decade, etc.)
 - i. Consider using [UP Notes](#) or [UP Monthly Goals Survey](#)
 - ii. Consider doing an Annual Review of your entire life every December³
 - e. Update goals as needed
4. Create Life Plan through [UP Life Plan](#)
 - a. Incorporate all Life Goals
 - b. Incorporate all Life Goal Plans
5. Improve your [personal team](#)
6. Improve your [productivity](#)
7. Improve your [time management](#)
8. Improve your [personal environments](#)

Assessments

List all of the assessments you might take to understand how you're doing compared to your objectives. Below are some sample assessments.

- [Quality of Life Assessment](#): an assessment to measure an individual's perception of their position in life in the context of the culture and value systems in which they live and in relation to their goals, expectations, standards, and concerns
- [Regulatory Focus Questionnaire \(RFQ\)](#): a questionnaire to assess individuals' orientations toward their goals
- [Short Grit Scale \(Grit-S\)](#): a scale to measures the individual's tendency to sustain interest in and effort toward very long-term goals (UP Top Pick)

³ This is also a great time to do “life work” maintenance (e.g., updating your [exocortex](#), updating records, reviewing subscriptions, processing photos, etc.).

Tools

List all of the tools you might use to achieve your objectives. Below are some sample tools.

- [360-degree feedback](#)
- [8,760 Hours](#)
- [Accountability partner](#)
- [Accountability by Text](#)
- [Accountable2You](#)
- [Beeminder](#)
- [BetterMe](#)
- [Bucket List](#)
- [Clearer Thinking Accomplish Your Goals](#)
- [Commit Action](#)
- [Commitpool](#)
- [Dreamfora](#)
- [Finilize](#)
- [GetMotivatedBuddies](#)
- [Go Fucking Do It](#)
- [Goalify](#)
- [Goalmap](#)
- [Goals](#)
- [Goalscape](#)
- [Habit](#)
- [Habit List](#)
- [Hypermind](#)
- [Inqwire](#)
- [Intend](#)
- [Joe's Goals](#)
- [JRNY Annual Review](#)
- [Lifetick](#)
- [Nirvana](#)
- [Optimize by Heroic](#)
- [Pathkeeper](#)
- [Repeat Habit](#)
- [RescueTime](#)
- [SelfStir](#)
- [StickK](#)

- [Strides](#)
- [SuperBetter](#)
- [The Grand](#)
- [Toodledo](#)
- [UP Annual Goals](#)
- [UP Annual Goals Dashboard](#)
- [UP Annual Plan](#)
- [UP Archive](#)
- [UP Assessments](#)
- [UP Curriculum](#)
- [UP Environmental Plan](#)
- [UP Goal Predictions](#)
- [UP Life Areas Taxonomy Design](#)
- [UP Life Audit](#)
- [UP Life Calculator](#)
- [UP Life Dashboard](#)
- [UP Life Goals](#)
- [UP Life Paths](#)
- [UP Life Plan](#)
- [UP Life Responsibilities](#)
- [UP Life Strategies](#)
- [UP Monthly Goals Survey](#)
- [UP Notes](#)
- [UP Productivity Plan](#)
- [UP Team Plan](#)
- [UP Time Plan](#)
- [UP Protocol](#)
- [UP Simple Life Dashboard](#)
- [Woop](#)
- [YearCompass](#)

Resources

List all of the resources you might use to achieve your objectives. Below are some sample resources.

- [Heaven Week](#)
- [Intend Beyond Goals Intensive](#)

Schedule

Decide on which days you will take which actions. You should add these dates to your calendar now.

- [Date]: Finalize plan
- [Dates]: Execute plan
- [Dates]: Review plan's outcomes

Predictions

Predict how well you will do in achieving your objectives.

- [Name]: I predict with [X]% confidence that I will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].
- Combined: We predict with an average [X]% confidence that [Name] will [Y] by [Z].

Outcomes

Objectively record how well you achieved your objectives.

- [Year 1]: [Outcomes]
- [Year 2]: [Outcomes]
- [Year 3]: [Outcomes]
- [Year 4]: [Outcomes]
- [Year 5]: [Outcomes]
- [Year 6]: [Outcomes]
- [Year 7]: [Outcomes]
- [Year 8]: [Outcomes]
- [Year 9]: [Outcomes]
- [Year 10]: [Outcomes]

Notes

Add any random thoughts, questions, and uncertainties you may have.

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