Values-Based Goal Setting Workbook

NAHID
COACHING & MENTORING

CoachNahid.com

Overview & Instructions

Values are a reflection of what is most important to you. Sometimes we can't see our values because we are focused on doing what we think we "should" do or wanting what we think we "should" want.

Needs are also a reflection of what is important to you. But your needs and your values are different. Your needs are important because you are missing something in order to be "okay". You have an emotional sense of urgency to "get this" and it may also be laced with fear or anxiety or anger about not "having enough of it". Your primary emotional goal is to get all of your needs met.

When your needs get met, your emotional state goes to a neutral place that some describe as a quiet sense of peace or joy or contentment. When you are in this state, the things you naturally gravitate to and still want to bring into your life are your values. In other words, once a need is met, it disappears and becomes less important and less urgent for you, unless it is also a value.

GOALS
What you want to accomplish

NEEDS
Required to survive emotionally and physically

VALUES
What matters most and who you are when you feel whole

Overview & Instructions

Sometimes your needs and values will overlap, and sometimes you will be confused, thinking a need is a value, but then later noticing your "value" has changed as other things become more important. Some needs are very difficult to get met, so they seem like values because they are always driving you and are more present in your mind than anything else. This makes them seem "most important" to you long term.

One way to test whether something is truly a need or a value is to imagine that there was a way for you to have "enough" of it. Then try to sense how you would feel if you had "enough". Would it still be something you would focus on as a priority, even once you had more than you need? In that case it is likely a value. If you want to "get enough" of something so that you can get on to enjoying your life, then it is more likely a need.

GOALS
Disappear once they are accomplished or abandoned

NEEDS
Disappear once they are fully met

VALUES
Stay with you always; your source of happiness and fulfillment

Overview & Instructions

The important thing to remember when going through this workbook is that It is okay to get your needs and values a bit confused, since they are both important when it comes to setting goals.

For most people, a long-term objective would be to build your life around your core values, while a shorter-term objective would be to get your needs met in order to decrease your stress and get rid of problems and issues that currently deplete your energy. This doesn't mean that you can't enjoy your values while you still have work to do getting your needs met, but you will find yourself de-prioritizing your values when you are overly stressed and burdened by unmet needs.

In this workbook we will help you identify your values first, and when you "re-stack" your values pyramid based on your goals for this year, you may see that your needs are stacking up on top. This is as it should be, as you have to take control of getting your needs met in order to truly live a values-based life.

Also, there is an expectation that you will see conflicts – which will often be reflections of the conflicts that you are playing out in your life. This is good, because with awareness, you can resolve these conflicts, or at least negotiate among them consciously, which gives you more control of your life.

My Favorite & Fulfilling Moments

Instructions: Write a brainstormed list of moments from your life that are your "favorites", when you felt happy and/or fulfilled. Include moments throughout your life, both in the recent and far past so you can see what patterns are consistent throughout.

Do not fall into the trap of saying "I haven't been happy for years". Ask yourself, what was my happiest moment in the past week? In the past month? Year? When I was in high school? Etc. Try to get a list of 20–25 "moments". Fill out column 1 first as quickly as possible, and then go back and fill out columns 2 and 3 when you can reflect and think. Feel free to use the values list on page 9 to help you choose words to put in column 3.

Situation	What made it a favorite or fulfilling moment?	What values show up in this situation?

My Favorite & Fulfilling Moments

Situation	What made it a favorite or fulfilling moment?	What values show up in this situation?

Your Ideal Life

Reflection Question:

You have a magic wand and can completely re-create your life from scratch. What kind of a life would you create for yourself? Describe it below in as much detail as possible.

Your Answer:

What does your answer tell you about your most important values? List the top ten values from the list on page 9 that you see reflected in your response:

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Forced Choice Exercise

Explanation & Instructions

On the prior pages you asked yourself questions, used your memories or imagination to narrate a response, and then analyzed your response to see what came up as most important for you. This lays the groundwork and gives you an idea of your core values. Now we will move onto a "forced choice" exercise where you choose your favorite words from a long list and narrow them down through a process of elimination.

This exercise will prompt you with words and may give you ideas that you missed in the prior exercises.

Your job is to go through the long list of words and pick your top 15 – the ones that represent what is most important to you. Then you will put them in the "forced choice" grid to prioritize them.

A good way to start is to look at each column and pick 3-5 top words in each column. Once you are done you will have a list of 18–30 words that appeal to you. Use a process of elimination to get rid of as many words as possible, so you have no more than 15. If you are able to eliminate more and end up with a "top 10" or even a "top 6" that will make the next part of the exercise even easier.

Please use the grid on the next page to choose your favorite words, and then use the process of elimination to choose no more than 15 "favorites".

List of Values

Abundance	Acceptance	Accessibility	Accomplishment	Accuracy	Achievement
Acknowledgement	Activeness	Adaptability	Adoration	Adroitness	Adventure
Affection	Affluence	Aggressiveness	Agility	Alertness	Altruism
Ambition	Amusement	Anticipation	Appreciation	Approachability	Articulacy
Assertiveness	Assurance	Attentiveness	Attractiveness	Audacity	Availability
Awareness	Awe	Balance	Beauty	Being the best	Belonging
Benevolence	Bliss	Boldness	Bravery	Brilliance	Buoyancy
Calmness	Camaraderie	Candor	Capability	Care	Carefulness
Celebrity	Certainty	Challenge	Charity	Charm	Chastity
Cheerfulness	Clarity	Cleanliness	Clear-mindedness	Cleverness	Closeness
Comfort	Commitment	Compassion	Completion	Composure	Concentration
Confidence	Conformity	Congruency	Connection	Consciousness	Consistency
Contentment	Continuity	Contribution	Control	Conviction	Conviviality
Coolness	Cooperation	Cordiality	Correctness	Courage	Courtesy
Craftiness	Creativity	Credibility	Cunning	Curiosity	Daring
Decisiveness	Decorum	Deference	Delight	Dependability	Depth
Desire	Determination	Devotion	Devoutness	Dexterity	Dignity
Diligence	Direction	Directness	Discipline	Discovery	Discretion
Diversity	Dominance	Dreaming	Drive	Duty	Dynamism
Eagerness	Economy	Ecstasy	Education	Effectiveness	Efficiency
Elation	Elegance	Empathy	Encouragement	Endurance	Energy
Enjoyment	Entertainment	Enthusiasm	Excellence	Excitement	Exhilaration
Expectancy	Expediency	Experience	Expertise	Exploration	Expressiveness
Extravagance	Extroversion	Exuberance	Fairness	Faith	Fame
Family	Fascination	Fashion	Fearlessness	Ferocity	Fidelity
Fierceness	Financial independence	Firmness	Fitness	Flexibility	Flow
Fluency	Focus	Fortitude	Frankness	Freedom	Friendliness
Frugality	Fun	Gallantry	Generosity	Gentility	Giving
Grace	Gratitude	Gregariousness	Growth	Guidance	Happiness
Harmony	Health	Heart	Helpfulness	Heroism	Holiness
Honesty	Honor	Hopefulness	Hospitality	Humility	Humor
Hygiene	Imagination	Impact	Impartiality	Independence	Industry
Ingenuity	Inquisitiveness	Insightfulness	Inspiration	Integrity	Intelligence
Intensity	Intimacy	Intrepidness	Introversion	Intuition	Intuitiveness
Inventiveness	Investing	Joy	Judiciousness	Justice	Keenness
Kindness	Knowledge	Leadership	Learning	Liberation	Liberty
Liveliness	Logic	Longevity	Love	Loyalty	Majesty
Making a difference	Mastery	Maturity	Meekness	Mellowness	Meticulousness
Mindfulness	Modesty	Motivation	Mysteriousness	Neatness	Nerve
Obedience	Open-mindedness	Openness	Optimism	Order	Organization
Originality	Outlandishness	Outrageousness	Passion	Peace	Perceptiveness
Perfection	Perkiness	Perseverance	Persistence	Persuasiveness	Philanthropy
Piety	Playfulness	Pleasantness	Pleasure	Poise	Polish
Popularity	Potency	Power	Practicality	Pragmatism	Precision
Preparedness	Presence	Privacy	Proactivity	Professionalism	Prosperity
Prudence	Punctuality	Purity	Realism	Reason	Reasonableness
Recognition	Recreation	Refinement	Reflection	Relaxation	Reliability
Religiousness	Resilience	Resolution	Resolve	Resourcefulness	Respect
Rest	Restraint	Reverence	Richness	Rigor	Sacredness
Sacrifice	Sagacity	Saintliness	Sanguinity	Satisfaction	Security
Self-control	Selflessness	Self-reliance	Sensitivity	Sensuality	Serenity
Service	Sexuality	Sharing	Shrewdness	Significance	Silence
Silliness	Simplicity	Sincerity	Skillfulness	Solidarity	Solitude
Soundness	Speed	Spirit	Spirituality	Spontaneity	Spunk
Stability	Stealth	Stillness	Strength	Structure	Success
Support	Supremacy	Surprise	Sympathy	Synergy	Teamwork
Temperance	Thankfulness	Thoroughness	Thoughtfulness	Thrift	Tidiness
Timeliness	Traditionalism	Tranquility	Transcendence	Trust	Trustworthiness
Truth	Understanding	Unflappability	Uniqueness	Unity	Usefulness
Utility	Valor	Variety	Victory	Vigor	Virtue
Vision	Vitality	Vivacity	Warmth	Watchfulness	Wealth
Willfulness	Willingness	Winning	Wisdom	Wittiness	Wonder
Youthfulness	Zeal				

Forced Choice Exercise

Explanation & Instructions

List your top values (up to 15) in any order in column one of the table below. Then look at the "forced choice" grid on the following pages. Once you have completed the "forced choice" exercise, you will come back to this grid, and enter the scores each value received. The values with the highest scores are your highest priority, and you will later organize them in your values pyramid based on that priority.

Value	Score	Priority
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		

Example Values Table

Explanation & Instructions
In this example, I am only listing 7 top values, but you can list as many as 15 for this exercise.

Value	Score	Priority
1. Personal Growth		
2. Comfort		
3. Financial Security		
4. Love		
5. Accomplishment		
6. Creative Expression		
7. Family		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		

Example Grid

	Personal Growth	Comfort	Financial Security	Love	Accomplishment	Creative Expression	Family	Value #8	Value #9	Value #10	Value #11	Value #12	Value #13	Value #14	Value #15
Personal Growth		Comfort	Financial Security	Personal Growth	Personal Growth	Personal Growth	Personal Growth	#1	#9	#1	#1	#1	#1	#1	#1
Comfort			Comfort	Love	Comfort	Comfort	Family	#2	#9	#2	11	#2	#2	#2	#2
Financial Security				Love	Accomplishment	Creative Expression	Family	#3	#9	#3	#3	#3	#3	#3	#3
Love					Love	Love	Family	#4	#9	#4	11	#4	#4	#4	#4
Accomplishment						Accomplishment	Family	#5	#5	#5	#5	#5	#5	#5	#5
Creative Expression							Family	#6	#9	#6	11	#6	#6	#6	#6
Family								#7	#9	#7	11	#7	#7	#7	#7
Value #8									#9	#8	11	#8	#8	14	#8
Value #9										#9	11	#9	#9	14	#9
Value #10											11	10	13	14	10
Value #11												11	11	11	11
Value #12													13	14	15
Value #13														14	15
Value #14															14
Value #15															

Example Values Table

Explanation & Instructions

Notice how I am taking the number of times each word showed up in my grid and putting that number as the score. Then, the highest score becomes the highest priority. Don't worry too much about breaking ties, as different values may trump each other depending on the life situation you are in. Having a relative priority is good enough.

Value	Score	Priority
1. Personal Growth	4	2
2. Comfort	4	2
3. Financial Security	1	4
4. Love	4	2
5. Accomplishment	2	3
6. Creative Expression	1	4
7. Family	5	1
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		

Forced Choice Exercise

Explanation & Instructions

On the Prioritizing Grid you will list your top values – up to 15 across the top and down the left side of the grid. In each light-colored box, compare the two values: the one listed in the row and the one listed in the column, and write the one that is most important to you. This is a "forced choice", so you must choose one over the other, even if it is isn't a clear-cut choice. You can use qualifiers in your head such as "most of the time" or "in normal circumstances" to help you choose.

The process of filling out all the light-colored boxes should result in a comparison of every value to every other value. In each box you will have written which of the two intersecting values is most important.

Once you have filled out all the boxes, simply count how many boxes have each value name in them. The number of times you chose and wrote a value in a box is the "score" for that value. Once all values have scores, you can assign each a priority. The highest "scored" value is your top priority, and so on until you get to your lowest scored value.

Use the grid on the next page to go through the forced choice process, then go back to page ten to complete the table by filling in the scores and priority for each of your values.
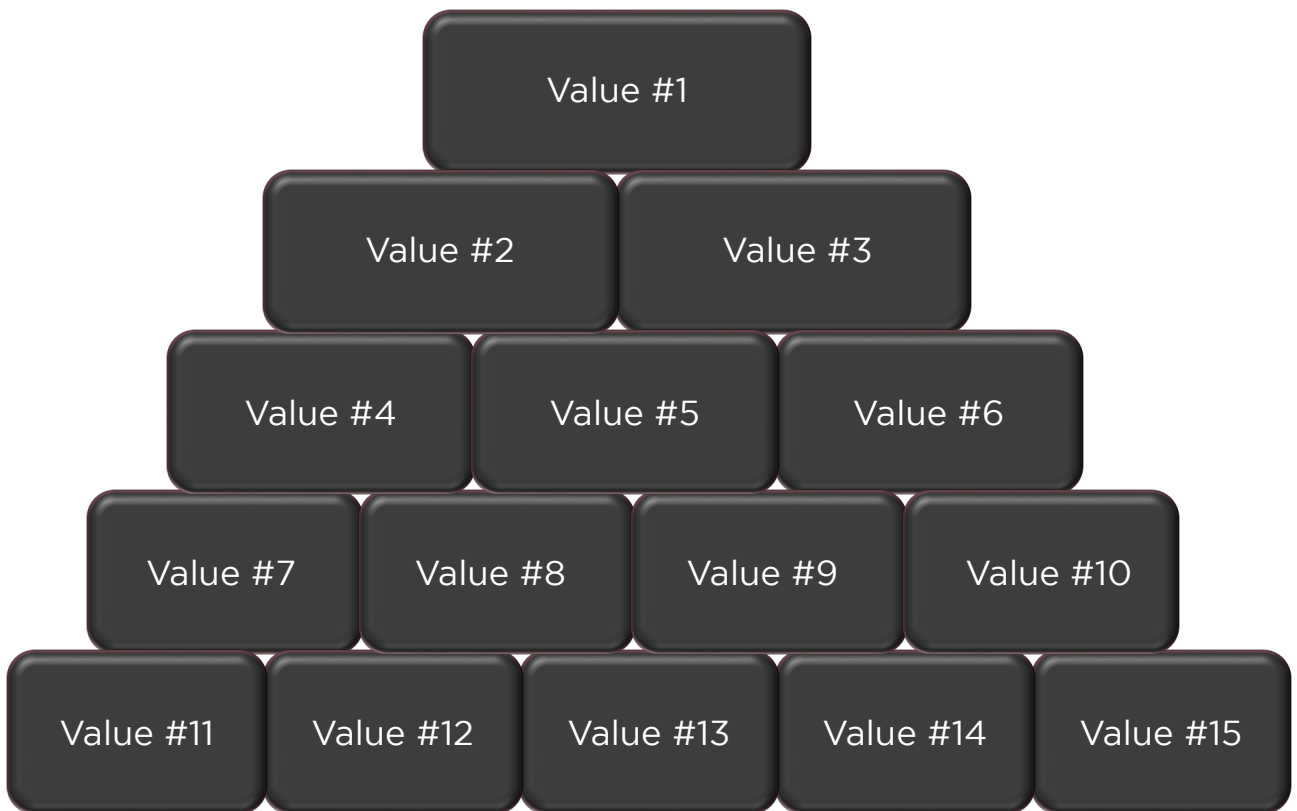
Prioritizing Values – Your Grid

Hint: It's easier to use value names (or abbreviations) instead of numbers

Write in Values															

Your Final Values Table

For your convenience, here is another blank copy of the values table that you can use to re-write your values in order of priority, based on how they came out in your grid.

Value	Score	Priority
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		

Values Pyramid Example

What it might look like once it is filled out, except with the actual names of the values. Top priority value goes on top, etc...

```
                    Value #1

             Value #2      Value #3

        Value #4     Value #5     Value #6

    Value #7    Value #8    Value #9    Value #10

 Value #11  Value #12  Value #13  Value #14  Value #15
```

Your Values Pyramid

Write your values here, in order of priority. The ones at the top are your core values.

Current Goals & Activities

Write a list of your top 3-6 goals for the next 3–12 months:

My Goals	What Value Does This Honor?

How do you spend your time? Write a list of the things you do that take up the majority of your time each day:

What I Spend the Most of my Time on:	What Value Does This Honor?

Your Values Pyramid

Priorities This Year

Here is where you will notice and resolve discrepancies between your core values, your current goals, and the reality of what you spend most of your time on. Eventually you will want to have your goals, priorities and the actual activities that you spend your time on all line up with your core values. But if you are like most people, you will likely notice that some values aren't being honored at all, and much of what you spend your time on is not related to your values.

Now you will make a list of your top goals and activities for the year, and for each one choose one value from your top 15 that this activity supports. If it isn't supported by a value, it may support something else you need in your life such as financial security, rest, family obligations, etc. The point is that you always want to know the "why" behind everything you are doing. When your "why" is a core value, you will be naturally motivated, you'll enjoy your work, and you will feel more fulfilled, engaged, and energetic throughout the day. If your why is NOT a core value, it's still important to know the reasons behind your choices.

Goal or Priority This Year	Top Value this Reflects	Why this Goal or Priority is Important to Me?

Initiatives Planning

Explanation & Instructions

Now that you have your values lined up with your most important goals, use the simple worksheet on the next page to write a basic plan to achieve your number one initiative for the year. Each section need only be used if it applies. You can use this to get started, and keep you focused in a "big picture" way. Revisit this document once every 1-3 months to see if it is still relevant based on whatever has come up in your life along the way. Feel free to make adjustments as needed.

Milestones: Some goals work really well with milestones. For example, if you are training for a marathon, your first milestone might be to run 1 mile, then 10 miles, etc. If you can't think of any milestones for your goal, it may be that you haven't yet found a way to "measure" your goal. See if you can think of a way to know in a tangible way whether you have achieved your goal or not, and if your goal has a "halfway there" experience. If not, skip milestones.

Daily Actions: You can achieve many goals by doing "a little something" every single day to move you one baby step forward towards that goal. It can be the same thing every day at the same time, which eventually becomes automatic and leverages the power of habits. Or, you can have a specific weekly activity that you do every Monday, and then something different on Tuesday, etc. You can set this up any way you want. But if you have something you can check off every day that is EASY, along with a way to reward yourself for doing it consistently over a certain period of time, you will find yourself making much more progress with much less effort.

Initiatives Planning (cont.)

If/Then Strategies: If/then strategies are the guidelines you provide for yourself that help you stay on track as "life is happening". For example, let's say you have a goal of exercising every day. You might say, "I will go to the health club every morning at 7am." And have the following "If/Then" strategies to help you out:

- If I can't get up in the morning in time to get to the health club, I will go for a quick run outside for 20–30 minutes.
- If it is raining, I will throw in an exercise video and do that.
- If I find that I did not exercise in the morning, I will take a walk at lunch or dinner time.

If/then strategies put you in control of your destiny, while also taking into account that life is not always going to conform to your plan.

Potential Obstacles: We all have one or two things that seem to always pull us away from what we intend to do. If you can identify those things and plan for them using an if/then strategy, you will have a much better chance of staying on track. For example, if you have a goal to lose weight but you always get frustrated and give up when the scale goes up instead of down after a week of hard work, you might have a strategy that says: "If I get on the scale and it has gone up that day, I will drink 72 oz of water that day, and remind myself that these things take time. I will use positive affirmations to stay on track."

In the obstacles box, list the things that might get in the way of you sticking to your plan, and write a plan for how you will address these challenges when they arise.

Initiative Planning

Your number one goal or theme for the year:

Your Major Milestones:
Milestone #1:   _____
Milestone #2:   _____
Milestone #3:   _____

Your Daily Actions:

Action	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Action #1							
Action #2							
Action #3							

Your If/Then Strategy:
If _____   then _____
If _____   then _____
If _____   then _____
If _____   then _____
If _____   then _____

Your Potential Obstacles and Strategy:

Obstacle	How I plan to handle it

Next Steps

I hope you have enjoyed going through this workbook and lining up your goals and initiatives with your core values. Our values-based goal-setting process is just one of many tools we provide that help clients build self-awareness, reduce stress, increase fulfillment, and work more effectively..

Consistent work on self-discovery and professional development not only improves your overall effectiveness, but it makes a huge difference in your personal life as well. Stress goes down, relationships get better, and more moments of joy show up every day. But be patient – it often takes time to put new insights into regular practice. If you find you aren't making the progress you'd like, don't hesitate to reach out.

We work with our clients individually and through our group program to accomplish what matters most and grow more effective and fulfilled in the process. The first step is a complimentary 30-minute phone conversation where we assess your needs and provide you with specific recommendations.

Get in Touch:

714.931.2133
nahid@coachnahid.com
CoachNahid.com