



**WSSFC 2023**

**Practice Management Track – Session 7**

# **Goals and Habits: The Foundations of Success**

*Presented By:*

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## About the Presenter...

**Erin R. Ogden** is a trademark and copyright nerd who loves helping businesses grow. Whether helping clients directly or working with other attorneys to help their clients, she helps identify, protect, and monetize intellectual property while looking at the business holistically. She enjoys helping companies identify and protect their intellectual property with trademarks, copyrights, and trade secrets for her clients. If necessary, Erin also helps figure out options available when it comes to disputes starting with cease-and-desist letters all the way up to preparing for litigation. She is also a bit of a nerd when it comes to contract drafting to fit the firm's goal to "keep things as simple as possible, but no simpler" (Thanks, Einstein!). She has helped start-up companies create their first licenses, re-vamped existing licensing protocols, and helped established companies take their first steps into licensing. Erin also works with companies to buy and sell businesses through asset purchases, stock purchases, membership purchases and mergers. Drop her a line or connect on social media. We'll nerd out together!

## Goals and Habits: The Foundations for Success

Erin R. Ogden, Ogden Glazer + Schaefer

Perhaps you've seen the meme that tells us that we all have the same number of hours in our day as Beyonce, and look at all that she has accomplished so get going. Clever, but the meme doesn't include that she doesn't wake up in the morning and say, "Hmm, what am I going to do today?" And she doesn't do it alone. What does she have? Plans and people. Guess what? So can you.

### THE LIES WE TELL OURSELVES

We all have stories that we tell ourselves. Many of it is true. Some – not so much. Some things are lies. Lies we want to believe in but shouldn't. Why do we believe? Sometimes it's because we've been told them so many times in so many ways by others that we internalize them. Sometimes it's because it is easy. Almost always it's because we never actually stopped to examine them and see if they are true.

For example, we are supposed to get all the things on our list done. How do we accomplish "all the things"? We don't. We may say we are going to do so. We write them down and doggedly work through them, but the list gets longer even as things get checked off.

The first lie we tell ourselves (and others) is that "I'm so busy!" and then equate productive for busy. Busy is a lot of flurries and no accumulation. It obscures your sight and your forward progress. Productive is targeted action, which leads to progress.

It seems if you've talked to any accountant or business coach, you've heard some version of the Pareto Principle. The Pareto Principle, named after economist Vilfredo Pareto, specifies that 80% of consequences come from 20% of the causes. It shows that there is often a fairly unequal relationship between inputs and outputs. Hence its alias: The 80/20 Rule This often is also expressed as 80% of your income comes from 20% of your clients or 80% of your problems come from 20% of your clients. But it also could be read to say that 20% of your actions will drive 80% of your returns. So let's pick that 20% with care so the 80% gets us much closer to where we want to be.

How do you pick the 20%? Priorities. The only way to be able to focus on what is important is to reduce the number of things that are important and that demand your focus.

Here's another lie: Everything matters equally. Of course, they don't. Cleaning the space behind your toilet is not equal in importance to brushing your teeth – even if you may use the same general tool to do either. You have to set out priorities so you are doing the most important things – those that fall in the 20% - or you are spending time on something that at best will get you less than 20% of your desired returns. You want your actions to matter most.

### Multitasking

Another lie is that we can multitask. We've all done it; we've tried to do two things at once. Reading email while on a phone call, filing documents during a CLE, direct messaging while writing a memo. We think "Look how busy I am! And I got two things done at once!" But what we forget is that it comes at a cost. Studies have shown that it takes 23 minutes and 15 seconds to get back on track after you've been interrupted. Mark, G., Gonzalez, V., and Harris, J. No Task Left Behind? Examining the Nature of Fragmented Work. *Proceedings of CHI'05*, (2005), 113-120. "When people are constantly interrupted, they develop a mode of working faster (and writing less) to compensate for the time they know they will lose by being interrupted. Yet working faster with interruptions has its cost: people in the interrupted conditions experienced a higher workload, more stress, higher frustration, more time pressure, and effort. So interrupted work may be done faster, but at a price." Mark, G., Gudith, D, and Klocke, U., The Cost of Interrupted Work: More Speed and Stress, *Proceedings of CHI'08*, (2008)

Better name for it: Fragmented work. Your work, time, and attention are fragmented. Unsurprisingly, that is stressful.

Stress continues to stick around due to phenomena called the Ovsiankina effect and the Zeigarnik effect. The Ovsiankina effect is the tendency to revisit an interrupted action again (and again) when it has still not been achieved until it is completed. The effect states that an interrupted task, even without incentive, is thought of as a "quasi-need". It creates intrusive thoughts, aimed at leading you to take up the task again (Hey, don't forget about X. Did you do X? What about X? Ping, ping, ping!). The Zeigarnik effect is the tendency that people remember unfinished or interrupted tasks better than completed tasks. Bluma Zeigarnik, "On Finished and Unfinished Tasks," in W.D. Ellis. Ed., *A Source Book of Gestalt Psychology* (London: Routledge and Kegan, 1938), 300-314. Incomplete tasks or unresolved questions engage - and often hijack - your attention until they are complete. Once tasks are completed, that "needed" information goes away (like cramming for a test and then not remembering it two days later), and your working memory has room to engage new information.

If you like visuals, think of having a 2x4 board that you want to use to its best purpose (or pie if you are hungry). Each cut takes away some of that valuable resource. The more cuts the less good stuff is available. Distractions will find you on their own. Don't go looking for them.

### Discipline

A third lie is that we just need more discipline. "If you really wanted to get stuff done, you would. You simply have to be (more) disciplined. No pain, no gain. Just do it!" Yeah, and if it were that easy, we'd all have our to-do lists to-done, be at our goal weight, and have all sorts of medals and trophies displayed to be admired.

You can't be "on" all the time with willpower being on stand-by ready for action at a moment's notice. It comes down to the two T's: Temptation and Timing. Willpower is like a lot of resources. It can be depleted or weakened. It is helped by lowering the hurdles it needs to clear

to do its job. Don't want to eat the cookies? Don't buy them. You need discipline once at the store, not every day will power to not eat that sleeve of Thin Mints for lunch.

### TAKE THE REINS

We have all of those things that "they" tell us, but it is really us telling ourselves. In order to succeed, we have to take responsibility for our own actions. We can control precious little in life, but we can control our thoughts, actions and reactions, and choices. We can't control anybody else's thoughts, actions and reactions, and choices. And let's face it, we are handfuls enough so let's focus on our thoughts, actions and reactions, and choices.

### Prioritize

You have to prioritize your energy and your time. Want to know what your priorities are? Look at where you are spending your time. Actions don't lie. Your time report shows your priorities. Do they line up with where you want to be? The wolf that grows is the one that you feed.

Time is a limited resource. That means that it is finite; there is not an unlimited amount of time. That means we must be intentional about our use of it. There is an opportunity cost with how we spend our time. An opportunity cost is the potential benefit I lost because I chose an alternative. If I only have \$10 in my pocket, and I buy a latte, I cannot also buy a burger. By getting one, I cannot get the other. I don't have the resources for both. When I wrote this paper, I used up time. Time that I can't get back and use to review a contract or have a meeting with a client. Because I don't have unlimited time, I lost the money I could have invoiced for contract review because I wrote this paper instead.

Or to put it another way, for every "yes," there are corresponding hundreds of no's. Every time I say yes, I am concurrently silently saying no lots of other things that I currently know about and even those that I don't. Even if it is implicit yes by doing an action, I am by definition not able to use that time to do anything else. I can't rewind and write a contract instead of this paper. If I ask my paralegal to file a trademark, I can't also have her prepare a report. Which is more important? That is a decision that must be made. Time is made up of "or" not "and."

We have to treat our time like a precious resource. It has to be used effectively. First, let's look at what you are doing right now, and which of those things you shouldn't be. Welcome to the Eisenhower Matrix or the 4 Ds. Which things are Do, Delay, Delete, or Dump. Put another way, divide your tasks into: Urgent/Important, Not Urgent/Important, Urgent/Unimportant, and Not Urgent/Unimportant.

Urgent/Important = DO	Not Urgent/Important = DELAY (Distractions)
Urgent/Unimportant = DELEGATE	Not Urgent/Unimportant = DUMP (Delusions)

(Don't worry; there's a bigger one at the end of this paper.)

If it is urgent and important, do it. Get it on your list and do it. Don't let the other stuff get in the way. If it is urgent, but not important, delay it. It is currently a distraction. Get it on your calendar so you don't have the Ovsiankina effect and the Zeigarnik effect hounding you (see intention implementation statements below). If it is urgent but unimportant, get someone else to do it. Delegate. And if it isn't urgent or important, why are you spending time on it? Dump it. You are delusional that you are ever going to get to it. Move on.

As you are filling out your Eisenhower Matrix, recognize everything that you are putting into the Delay, Delegations, or Dump buckets and yet continue to do are opportunity costs with a negative balance. The first step is to recognize the behavior. Anyone with any square blank in the Matrix is likely a liar. That is completely useless. Be honest; build a baseline. Then we can know where to begin and how to improve.

## GOALS

First, read my article about goals published by the State Bar of Wisconsin. Back already? Great! I've convinced you that goals matter. They help guide priorities. They provide freedom, catalysts, and momentum. So, let's get started.

What makes a good goal? I'm sure you've heard of SMART goals, but I encourage you to take SMARTIES.

- S – Specific
- M – Measurable
- A – Actionable
- R – Relevant
- T – Time Bound
- I – Intrinsic
- E – Extra
- S – Stated

There are thousands of write ups about the SMART part. Go read some. For now, I'll provide what helps me stay on target with them.

### S – Specific

Specificity is key. How do you know where you are going if you don't know where you are going?

## M – Measurable

How can we know when to celebrate if we don't know when it is complete?

How do you know you've made progress?

## A – Actionable

A fast track to failure is to set goals for someone else. I love to set "future Erin" up for failure by pretending that I am clearly someone else. Someone who already knows how to code, wakes up at 4:30 am, and doesn't need to eat. Guard against that. Future you will thank you. That doesn't mean a goal can't require you to learn something new (See E below), but it does mean you have to recognize and plan for that. Is there actual time on the timeline? Look at T below. Is that realistic given my priorities?

Also, use action verbs. Goals propel you forward. They are made for movement, for action.

## R – Relevant

Remember the Pareto Principle? Yeah, that matters. If your short-term goals don't align with your long-term goals, then what are you doing? Make sure these are in alignment with your big picture. For Simon Sinek devotees, does the goal fit with your "Why?"

For Grant Cardone followers, is it worthy of your obsession? As he says, "The key to tying your obsession to your purpose is to continue to set new goals for yourself." *Be Obsessed or Be Average*, 2016.

statements.

## T – Time Bound

If "Goals are dreams with deadlines," then goals without deadlines are just dreams. Dreams are fun, but they aren't productive. Put some timelines together.

## I – Intrinsic

Are your goals coming from you? Tal Ben-Shahar is a teacher and writer in the areas of happiness, positive psychology, and leadership. In his book, *Happier: Learn the Secrets to Daily Joy and Lasting Fulfillment (2007)*, he has a whole chapter about setting goals. He posits that those people who set goals (you know, those with explicit objectives that are challenging and specific with clear timelines and performance criteria) are more likely to succeed and better perform. And if those goals are self-concordant, then those people pursuing them, not just achieving them, are happier. Self-concordant goals are those connected to a deep personal conviction or a strong interest. It's the "heck, yeah or don't do it" approach.

Again, if you are a Simon Sinek fan, consider making your goals:

- For something – affirmative

- Inclusive
- Service oriented
- Resilient
- Idealistic

*The Infinite Game.* 2019.

Not a Sinek fan, that's fine, but do make sure your goals matter to you. Find goals that matter to you, not ones you "should" have, but you want to have.

E – Extra

Set BIG goals. "I will judge myself less for coming up short than never going for it," exhorts Mr. Cardone in *Be Obsessed or Be Average*. You probably have been asked what your BHAG is. BHAG = Big Hairy Audacious Goals. Remember Mr. Ben-Shahar's thesis: Goals work best if they have explicit objectives that are challenging and specific with clear timelines and performance criteria. Challenging isn't something you know you can do. It's something that you think you can do with effort. Big growth only happens if there is the opportunity for big growth. Or put another way, if you don't set yourself up for growth, you won't grow.

S – Stated

By simply writing it down, you increase your chances of success. Murphy, M. "Neuroscience Explains Why You Need To Write Down Your Goals If You Actually Want To Achieve Them", Forbes.com, (Apr 15, 2018). Really want to get something done? Share that writing; tell people you are doing it. Then ask them to check in on you. Maybe it is something more formal like an accountability group or partner. Maybe it's the fear of someone asking how its going and you having to say you've done nothing. Perhaps it's an app like Asana, To-Doist, Trello, or Microsoft or Clio Tasks. Or perhaps it is evil genius. Set a goal with timelines. Then if the deadline passes without the action being completed, donate money to an organization that you DON'T agree with. Diehard Democrat? The GOP is always raising funds. Avid hunter? PETA makes it easy to give. And vice versa.

YOU ARE YOUR ACTIONS

Behavior activation is a branch of psychology focusing on how one's environment shapes their actions and their mental health. By deliberately practicing certain behaviors, you can activate an emotional state. Go for one of the positive ones because this can lead to virtuous cycles or vicious cycles. By acting, you actually start finding yourself in the situation that leads to that feeling. Act according to plan rather than waiting to feel ready. The action helps you become ready.

What you do is what you find easy to do. Ease is the single best predictor of behavior. You do whatever is the least hard thing to do. How do you make things less hard (even the hard stuff)? You build habits, routines, and rituals around the desired actions.



## HABITS

Habits are actions that you perform on a repeated basis without active thought. Aristotle said, “Virtues are formed in man by his doing the actions,” Aristotle said. The writer Will Durant reformatted it as “We are what we repeatedly do. Therefore, excellence is not an act, but a habit.”

There are two processes for processing thoughts. One process addresses a lot of our needs. It monitors for threats and opportunities. It is mostly controlled by the amygdala, which means it is a lot of emotion and actions unconsciously and automatically. It bypasses the neocortex. The other process lives in the neocortex and is conscious and rational. This takes a little longer (sometimes only seconds longer, but often much longer). It weighs and analyzes. Habits live in the first process, but that doesn't mean they can't start in the second. Think of that old analogy of riding a bicycle. You had a whole lot of conscious thought going into those first rides, but now it's well, like riding a bike.

### Implementation Intention

Implementation intentions are statements that set out the what, when, and where of your actions that you need to take. They often look like this:

I will [BEHAVIOR] at [TIME] in [LOCATION].

*I will take Lola for a 2 mile walk at 7:00 am through the big park.*

Other times, they look like this:

If or when [CONDITION OCCURS], then I will [BEHAVIOR].

*When we can walk 2 miles in less than 35 minutes, then we will start walking 2.5 miles.*

Often, it is a combination:

*I will take Lola for a 2 mile walk at 7:00 am through the big park. If it is rainy and below 40 degrees, I will take Lola to the yard and then go to the treadmill for a 2-mile walk.*

The trick is to be specific. Detail exactly what you are going to do, when you are going to do it, and where or how it's getting done. By doing so, it gathers its own momentum and soon it will be pulling you along. Imagine telling a five-year-old that you will take them for ice cream after school at their favorite place. You bet your buttons they are going to remember that and make sure it happens. Your brain is often similar to a five-year-old. Tell it something might happen sometime in the vague future, it may or may not happen. I mean, we've got games to play, TV to

watch, dogs to pet. Ice cream at 4? Ready and reporting for action! Even more so if you write it down or put it on your calendar.

Your inner five-year-old won't even let you think about skipping out – even on the hard stuff (It's not all ice cream, I know). Keep doing it over and over, and it becomes more automatic. You don't have to think about where it will fit in, how you start, or when to get ready. You know, a habit.

## RITUALS

We have habits (good and bad). We have routines (intentional and non-intentional). But rituals? Maybe not so much. Setting and implementing goals can be pretty stressful. Anxiety often rides along on any journey to a goal – especially those growth goals. If it is causing growth, it is causing you to push and stretch. That almost always means stress. So, if we opt to set growth goals (and you know I do), how can we increase the happiness and reduce the anxiety that comes with those high goals?

Assuming we set SMARTIES goals, we can focus on the implementation of them. If we see them as homework, we likely won't wring as much happiness out of it as we could. enact a mind shift about how to go about achieving goals. We often hear about “self-discipline” when it comes to goals. But what if we shifted from a focus on the discipline aspect to something else? What if we focused on the act of acting and the why? What if we got rid of the guilt of not acting and instead moved towards setting ourselves up to act? That's where rituals come in.

The word “rituals” brings to mind candles, robes, and maybe some chanting, but while a ritual can include those things, there is no requirement. A ritual is repeated steps of behaviors or actions - just like a habit or a routine - but with a very important difference. A ritual is a set of repeated behaviors done with intention, done mindfully. Rituals aren't meant to produce a practical result externally, but rather they are meant to produce an internal state. They are very precise behaviors performed in a specific way at a specific time and best if motivated by a deeply held belief. They are a set of intentional actions that get you ready to act at the next level.

Habits are repeated steps but usually the brain is absent. That's what we like about them. I don't have to spend much brainpower brushing my teeth or making my morning tea. It just gets done while I am figuring out my day. Routines have a bit more thought process. I have a reason for them (often to reach a goal). Going for a run or going to a yoga class doesn't happen without thought (and often a pep talk). And often, it is done by going through the motions, not precisely, specifically, or with much motivation other than to get it done.

But a ritual requires you to be engaged. Each step is prescribed. By following a ritual, the same steps get done in the same order with the purpose of paying attention to each step as it is being done. Rituals require precise behaviors that are motivated by belief and desire. You don't ask

later “Did I remember to do it?” like you might do with a routine or a habitual action. You must be present for a ritual.

By doing this, by connecting action with meaning, these repeated actions can get our thoughts aligned with our action. It prepares you for action, but also gets action started. There’s no punking out once the ritual candle is lit. By creating a ritual, you think about what it is that you want to achieve, why you want to do so, and what you need to be ready to do it. Then each time you perform the ritual, you remind yourself of each of those things, and it sets you up to act upon them.

## SUGGESTIONS

### Priorities Set Actions; Actions Show Priorities

- 1) Each day set a maximum of 3 Will Do items.
  - a) These are the things you WILL get done today. Let nothing distract you from those 3 until they are done.
  - b) Maybe it’s only 2, but never more than 3. Anything more than that is a Wish List.
  - c) Use your Eisenhower Matrix to help ensure they are yours to do.
  - d) Use your Forced Matrix to help prioritize your Wish List
- 2) Track the Frog.
  - a) If you let something slide on your daily Will Do, analyze why.
  - b) Is it really a Do, or did you let a Delegate or Dump into your list?
  - c) If it goes 3 days, you have delayed enough. It is your frog. Eat it.
- 3) Intention Implementation statements.
  - a) Every task that goes in the Delay quadrant (a/k/a isn’t immediately done) or is a regular occurrence gets one.
  - b) Get your Plan B’s (If/then statements) ready, too.
- 4) Time blocks should match above and be close to sacred.
  - a) Actions show priorities.
  - b) Why if the Will Do items are priorities and you have time set aside, are you letting other things take over? What are your priorities?

Have problems narrowing down to three? Check out the forced matrix at the end of this paper. You put in the top 5-10 on left side and the top side in the same order. Then judge each on a one to one grudge match which is more likely to get you to where you need to be. Then note that – left or top. Once that is done, tally the columns and rows, the T’s and L’s. Add the T’s and L’s for each action. Three highest numbers win.

## Intention Implementation Statements

Intention implementation statements are statements that set out the what, when, and where of your actions that you need to take. Sometimes they look like this:

I will [BEHAVIOR] at [TIME] in [LOCATION].

*I will take Lola for a 2 mile walk at 7:00 am through the big park.*

Other times, they look like this:

If or when [CONDITION OCCURS], then I will [BEHAVIOR].

*When we can walk 2 miles in less than 35 minutes, then we will start walking 2.5 miles.*

Often, it is a combination:

*I will take Lola for a 2 mile walk at 7:00 am through the big park. If it is rainy and below 40 degrees, I will take Lola to the yard and then go to the treadmill for a 2 mile walk.*

Blank ones are also below. Give them a try for something you wanted to get done this weekend.

## CONCLUSION

“Everything you do is based on the choices you make. It’s not about your parents, your past relationships, your job, the economy, the weather, an argument or your age that is to blame. You and only you are responsible for every decision and choice you make,” Wayne Dyer reminded us. So let’s be deliberate with those decisions and turn them into actions so we can be productive, happy, and dare I say, successful, in whatever way you want to define it.

## EISENHOWER MATRIX

Urgent/Important = DO	Not Urgent/Important = DELAY (Distractions)
Urgent/Unimportant = DELEGATE	Not Urgent/Unimportant = DUMP (Delusions)

## Forced Matrix

List your goals traits across the top and down the left hand side in the same order. Look at each box and compare the goal on the left with the goal at the top. Mark the box with a "T" if you think the top goal is more important or mark it with a "L" if you think the left side goal is more important.

Add the total L's for each row and place the total in the right had column.

<u>Goals</u>										Total L's
<b>Total T's</b>										
<b>Category Total</b>										

Add the total T's and place the total in the second last or "Total T's" column

Add the total L's and total T's for each item and put this number in the bottom row.

IMPLEMENTATION INTENTION STATEMENTS

I will [BEHAVIOR] at [TIME] in [LOCATION].

I will \_\_\_\_\_ at \_\_\_\_\_ in \_\_\_\_\_.

I will \_\_\_\_\_ at \_\_\_\_\_ in \_\_\_\_\_.

I will \_\_\_\_\_ at \_\_\_\_\_ in \_\_\_\_\_.

If or when [CONDITION OCCURS], then I will [BEHAVIOR].

If or when \_\_\_\_\_, then I will \_\_\_\_\_.

If or when \_\_\_\_\_, then I will \_\_\_\_\_.

If or when \_\_\_\_\_, then I will \_\_\_\_\_.



APRIL 10, 2023

## Practice Management

# Goals Are Guides, Not Cudgels

The best (most likely to be reached) resolutions come from within and are based on a person's own self.

ERIN R. OGDEN

[Comments \(0\)](#)

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A  A

Each year we are inundated with lists of New Year's resolutions that we "should" be doing. We often set annual goals based on the preceding year's actions (or inactions). We go to the gym diligently for a few weeks and avoid leftover holiday treats until at least Valentine's Day. Many of us then forget what those resolutions were (if we ever set them) and feel guilty when we have the same resolutions the next year.

But what if we look at goals as a benefit, not an assignment? As a launchpad, not a mandate? What if instead of "have to," we "get to" set and move toward our goals? And what if we gain something not only in the final achievement but on the journey toward the goal, too?

### A Better Way to Set Goals

Studies and life experiences show us that pursuing self-concordant goals can make people happier. *Self-concordant goals* are goals that express a person's being, not those imposed on the individual. They are aligned with a person's authentic self and what the person wants to do. They represent enduring interest and values set by the goal setter, not by an external source. A self-concordant goal for new attorneys could be that they want to improve their emotional intelligence by becoming more empathetic to clients. A goal that is likely not self-concordant would be billing 1,600 hours.

**Determining What Is Meaningful.** The first questions to ask when setting goals are the following: What matters to me? What do I want to accomplish? And why? If you can't answer the "why," then a resolution likely will not last. And if the why seems to be external, recognize the goal for what it is. Not all goals must be self-concordant, but you likely will need more



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goals must be self-concordant, but you likely will need more motivation to reach them because you are not basing them on internalized interests.

Trying to stick to a resolution can do much more than giving the satisfaction of attaining the substance of the goal (for example, going to the gym three times per week, reading 100 books, responding to emails within 24 hours). After all, goals are not merely the ends; they also include the means.

Goals often are couched as restrictions: Lose 10 pounds, so don't eat that cake. Go to Hawaii, so don't go to Nashville. But goals can liberate, too.

— Madison. She is a member of the State Bar of Wisconsin's Business Law, Intellectual Property and Technology Law, and Solo/Small Firm & General Practice sections.

## Fewer Choices Can Be Freeing

Goals can be liberating by providing parameters and thus reducing the number of choices. Goals set a destination. They guide you on the journey to where you want to go. In *Alice in Wonderland*, Alice and the Cheshire Cat discuss this:

"Would you tell me, please, which way I ought to go from here?"

"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where--" said Alice.

"Then it doesn't matter which way you go," said the Cat.

"-so long as I get SOMEWHERE," Alice added as an explanation.

"Oh, you're sure to do that," said the Cat, "if you only walk long enough."

Alice is wandering and will keep doing so until she picks a destination. Each crossroads requires an arbitrary decision that lacks meaning but likely is made only after lengthy consideration and without much confidence. People in Alice's position spend a lot of time and effort looking at pros and cons, but doing so doesn't help because there is nothing to measure the results against.

But if we know our destination, then we have guidance for each decision. Which option will get me closer to my goal? We now know what to measure. Will this take me closer to or farther away from my goal? Is this slowing my progress or speeding it up? Is this attractive but a distraction nonetheless? We only have answers if we have a destination.

Goals are also liberating because they allow us to focus. If we know where we need to go, we can focus on how to get there. We can focus on making better decisions and focus on where we are now. We don't have to take time and effort to decide and debate the "where" and, instead, can focus on the "how."

## Goals Are Catalysts

Goals provoke change. The creation of clear goals, on its own, moves a person toward achieving them. William H. Murray wrote the following in *The Scottish Himalayan Expedition*:

"Until one is committed there is hesitancy, the chance to draw back, always ineffectiveness. Concerning all acts of initiative or creation, there is one elementary truth the ignorance of which kills countless ideas and splendid plans: That the moment one definitely commits oneself, then Providence moves, too. All sorts of things occur to help one that would otherwise never have occurred. A whole stream of events issues from the decision, raising in one's favor all manner of incidents and meetings and material assistance which no man would have believed would have





# Goals and Habits: The Foundations for Success

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1

## The Lies We Tell Ourselves

- Common "lies"
  - Busy = Productive
    - Everything matters equally
    - Multitasking works
  - Willpower and discipline is all you need

2

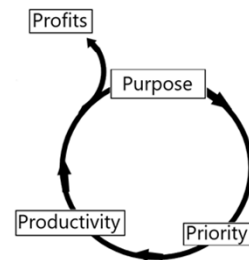
## Take the Reins

- To succeed, take responsibility for your success
  - Control what you can control
    - Your thoughts, actions, and choices
  - Let go what you can't
    - Others' thoughts, actions, and choices

3

## Priorities

- Purpose sets priority, priority determines productivity
  - Purpose – Where are we going
  - Priority – What has greater importance
  - Productivity – Actions we take
- Actions prove priority, priorities prove goals
- Opportunity Costs
  - Every "yes" comes with a bunch of "no's"



4

## How Do You Choose What to Do?

- Prioritize
  - Forced Matrix
- Don't waste time on things that don't matter
  - Eisenhower Matrix

5

## Know where you are going

- The Cheshire Cat
  - "Would you tell me, please, which way I ought to go from here?"
  - "That depends a good deal on where you want to get to," said the Cat.
  - "I don't much care where--" said Alice.
  - "Then it doesn't matter which way you go," said the Cat.
  - "-so long as I get SOMEWHERE," Alice added as an explanation.
  - "Oh, you're sure to do that," said the Cat, "if you only walk long enough."
- George Harrison ("Any Road")
  - But if you don't know where you're going
  - Any road will take you there

6

## Goals Provide

- Freedom
- Catalysts
- Momentum

7

## Good Goals are Made

- S – Specific
- M – Measurable
- A – Achievable
- R – Relevant
- T – Time Bound
- I – Intrinsic
- E – Extra
- S – Stated

8

## S – Specific

- What exactly do you want to accomplish?
- Action Verbs

9

## M – Measurable

- Need metrics
  - Perhaps some milestones
- How do you know when to celebrate?

10

## A – Actionable

- Action verbs
- Do you have time on your timeline?
- Are they for you?
- Do you know what this is?
  - This a short-term or a long-term goal?
  - A mission, value, or a why disguised?

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## R – Relevant

- Does this fit your overall strategy?
- Alignment
  - Does this align?
  - Do other things align with this?

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## T – Time Bound

- What is your deadline?
  - “Goals are dreams with deadlines”
  - Conversely, goals without deadlines are dreams

13

## I – Intrinsic

- Does it ring true?
- Buy in – even from yourself

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## E – Extra

- Is it a goal or a to-do?
- No growth by staying where you are
  - No growth = No growth
- BHAG = Big Hairy Audacious Goals
  - “I will judge myself less for coming up short than never going for it.”  
– Grant Cardone.
  - Don’t be your own naysayer
  - “Haters gonna hate, hate, hate” – Taylor Swift
  - Infinite vs. Finite – Mission vs. Goal
- Get comfortable with being uncomfortable

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## S – Stated

- How are you held accountable?

16



## You are your actions

- “Virtues are formed in man by his doing the actions.” - Aristotle
  - Will Durant reformatted it as “We are what we repeatedly do. Therefore, excellence is not an act, but a habit.”
- “Be miserable. Or motivate yourself. Whatever has to be done, it's always your choice.” – Wayne Dyer

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## Habits

- Actions that you perform on a repeated basis without active thought
  - Can be good or bad
  - Hard to break, hard to create
  - Can be learned (and unlearned)

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## Rituals

- Specific, prescribed, intentional, mindful steps
- Prepares you for an action
  - Gets you in the right mindset
  - Reminds you why you are acting

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## Discipline

- Needed, but not a permanent setting
  - “There is no domination without discipline” – Grant Cardone
  - You need it when you need it. Plan for it.
  - Create atmosphere where
    - Your Big Picture and your Action Plan align
    - You can focus on what's important
- Make it easy
  - Create atmosphere
  - Use habits, routines, and rituals

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## Start With Goals and Priorities

- "What's the One Thing I can do such that by doing it everything else will be easier or unnecessary?"
- "Does this make the boat go faster?"
- "I must decline, for secret reasons."

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## EISENHOWER MATRIX

<b>Urgent/Important = DO</b>	<b>Not Urgent/Important = DELAY (Distractions)</b>
<b>Urgent/Unimportant = DELEGATE</b>	<b>Not Urgent/Unimportant = DUMP (Delusions)</b>

22

## Intention Implementation Statements

- I will [BEHAVIOR] at [TIME] in [LOCATION].
- If or when [CONDITION OCCURS], then I will [BEHAVIOR].

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## Priorities Set Actions; Actions Show Priorities

- **Each day set a maximum of 3 Will Do items.**
  - These are the things you WILL get done today. Let nothing distract you from those 3 until they are done.
  - Maybe it's only 2, but never more than 3. Anything more than that is a Wish List.
  - Use your Eisenhower Matrix to help ensure they are yours to do.
  - Use your Forced Matrix to help prioritize your Wish List
- **Track the Frog.**
  - If you let something slide on your daily Will Do, analyze why.
  - Is it really a Do, or did you let a Delegate or Dump into your list?
  - If it goes 3 days, you have delayed enough. It is your frog. Eat it.
- **Intention Implementation statements.**
  - Every task that goes in the Delay quadrant or is a regular occurrence gets one.
  - Get your Plan B's (If/then statements) ready, too.
  - Time blocks should match above and be close to sacred.
  - Actions show priorities.

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## Just Do It

- Don't be a perfectionist
  - Get it done. Then get it done right.
  - Persist and one day you will be perfect
  - 'Do the best you can until you know better. Then when you know better, do better.' – Maya Angelou

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## But what about...?

- Can't believe I didn't include something?
  - Maybe I haven't read it yet?
  - Share with me on LinkedIn or email.

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Talk to me

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come his way.”

Murray then wrote (possibly quoting Goethe), “Whatever you think you can do or believe you can do, begin it. Action has magic, grace, and power in it. In other words, by committing, by starting, you start gears that you don’t even know about yet.”

Another analogy is Newton’s First Law of Motion, which states that a body at rest will remain at rest unless an outside force acts on it, and a body in motion at a constant velocity will remain in motion in a straight line unless acted upon by an outside force. That is, if you aren’t moving, you will stay still until pushed, but if you are in motion, you will stay in motion until stopped.

Goals are part of the push. Routine distractions are part of the stopping. But a goal can help push a person to stay in motion even when frictions slow the person down or tempt the person to put on the brakes. A self-concordant goal will push a person forward with more force for a longer time than will an externally imposed goal.

## Self-concordant Goals Are Powerful

Meaningful goals, ones that reverberate with you, tend to be stronger than goals that are imposed by other people. An external push might set you in motion but the motion will be easily slowed by life’s routine obstacles. In contrast, self-concordant goals tend to lessen the friction and provide continuous pushes. There is a role for other people: Seeking support from an “accountability partner” can help you overcome the friction and maintain momentum.

Your goals are for you, and they are most powerful when you create them. They will liberate you, focus you, and compel you to move forward.

Consider a billable-hours goal. Although many people are subject to externally imposed numbers – from bosses or because of expense lines on profit-and-loss statements – one need not think of them only as numbers. Billable hours can reflect experience gained. A self-concordant goal that correlates with that external mandate might be, “Gain 400 hours in novel real estate transactional experience.”

A time-related goal for a business owner might be, “Go to Hawaii for two weeks with my family and look at them rather than my phone while there.”

If you set goals to gain clarity and momentum, the path to the top might be easier, shorter, and more meaningful.

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