

GOAL SETTING GUIDE FOR COUPLES

Jay and Wendy Papasan, 2017

Note: This document was modified with the permission of Jay and Wendy Papasan in order to remove the schedule format from their live event and add a few areas of exploration relevant to the Ready Set Love® audience. I added some comments from Jay that he shared on the podcast, and in addition to the 7 Life Categories defined in The ONE Thing book on page 114, I added a few more that you can additionally explore in your goal setting:

We hope you enjoy these couples goal-setting retreat tips and list of thought-provoking questions! We recommend taking two evenings and three days the first time if you can get away with it. Busy couples may want to get an overnight babysitter, or set aside a day or an afternoon to start. Ideally, you might do this over a relaxing weekend without interruptions from work or family somewhere away from home where you can be 100% focused on each other and the life you want to create together. Reviewing the questions ahead of time will give each partner time to think about the answers before you meet. Feel free to add your own questions!

- Jay and Wendy Papasan

Your goal-setting retreat can focus on a few important areas of life, or on many if you have the time. We recommend that you identify at first what each of your top three topics is, and make sure that you don't have too many topics for the amount of time you have allocated. If you only have an afternoon, pick one or two of the most important subjects. If you have a weekend, you can map out ten topics, or be flexible and see what emerges as the weekend develops. Have agreement on the topics of focus for your retreat and write them on a board or piece of paper, even if you're allowing flexibility for other topics to get some attention.

There are many important areas of life that you share together, so it can be difficult to pick only a few when you don't have a lot of time. That is why we recommend taking a weekend for yourselves for this process if you have that ability. You don't need to use our list of topic areas to choose from—you can add your own—but here is a short list of important areas in a couples life that you can choose from:

TOPICS

- Spiritual Life (including that of the family and of any children)
- Physical Health (eating, exercise, weight management, kids' activities, supporting one another)

- Personal Life (Hobbies, desire to learn skills like piano or Spanish, sports, time to oneself, i.e. "me time.")
- Key Relationships (How is our relationship doing, strengths, weaknesses, are we growing closer or becoming distant?)
- Job (Do we want to move forward in our current position, what support do we each need, how much time should we allocate to work?)
- Businesses (Does one or both of us own a business? If so, how do we want to grow or maintain that business? Should we collaborate more, less?)
- Our Finances (Do we want to save more, increase our net worth, discuss what we value spending money on)
- Our Romantic and Sexual Life (Do we like how it is? Does one of us want more from it, or less? How can we make it more fun and pleasurable for both of us?)
- Parenting (Do we want children, work/life balance with kids, parenting philosophies and approaches)
- Our Lifestyle (Do we want to take more vacations, do hobbies together, have more dates? What activities are fun for us?)

ACTIVITIES

- Ask each other questions on the above topics. See example questions below. Listen to one another and sketch out common goals or differing values on your white board or piece of paper.
- Calculate your net worth (there are calculators online), review your household budget, and set the most important priorities for spending and saving.
- Discuss and block off all your vacations for the year.

THOUGHT-PROVOKING QUESTIONS

The questions and categories listed on this questionnaire are not meant to be all-inclusive. Don't try to pinpoint any "right" or "wrong" answers; rather, use this document as a catalogue of ideas to jump-start your goal-setting process and help you understand and appreciate your partner's thoughts and priorities.

Spiritual Questions

What are our priorities for our spiritual life? What steps do we want to take to improve our spiritual life? What are our priorities for our children's spiritual life? What should we tell our children about God? What spiritual rituals do we want to introduce into our family? What are our daily gratitude and other spiritual habits?

Physical Questions

How can we improve our eating habits? What can we do to incorporate exercise into our family activities? Should we join a gym this year? Which athletic or physical activities should our children be involved in? Do we need to lose/gain weight? What should I do to make myself more attractive to my spouse? Are there any athletic goals I want to pursue (i.e. run a mile--or a marathon)? What can I do to encourage or enable my spouse to meet his/her physical goals?

Individual Personal Questions

Are there any skills or sports I want to learn (i.e., to play the piano, take up golf, speak French, or learn to pick locks?) Are there creative endeavors we want to undertake as a family? Do each of us get enough time to work on ourselves? Do we each have enough "met time" to decompress and de-stress?

Key Relationship Questions

Marriage

Is our marriage headed in the right direction? Are we growing closer and is the relationship maturing? Are we meeting each other's emotional needs? Are we meeting each other's physical needs? Are we meeting each other's intellectual needs? What kinds of things can we do to ongoing support each other? What do you NEED from me this year? How can we more clearly communicate with each other? Should we go out more often, or make more time for romance? What can we do to improve our sex life? What do we want our marriage to look like five years from now? What do I see as my partner's primary responsibilities in the marriage relationship? What do I see as my primary responsibilities in the marriage relationship?

Children

Do we want children? What are the most important character traits we want to see our children develop? What rules do we want to establish for our children at home and in public? Manners? How should we spend weekends and other leisure time? Does our devotion to our children interfere with or hamper our marriage relationship? Do we support one another in front of our children? What traditions do we want to introduce to our family this year?

Extended Family

What are our relationships with our extended family? Do we need to think about helping aging parents? Brothers or sisters who might need care in the future?

Our Friendship

Do we get along as friends? Do we compliment, encourage and support one another enough? Do we 'get' each other's dreams? Do we like to read or watch shows together? Do we talk about our lives and do we enjoy interacting? Do we trust the other has our back?

Friendships with Others

If we are the sum of the five people we are closest to, what key relationships do we have and which ones need developing? Are there any specific people we would like to get to know better this year? Should we entertain more? Are there people we should help, befriend, and care for?

Our Romantic and Sexual Life

Do we feel attractive to one another? What could we do to feel more desired by the other? Do we want to have sex or not? Does sex feel good or not? How do we like to be romantic that doesn't have to turn into sex?

Financial Questions

How do we feel about money? How was money used or talked about in our original families? What is our net worth? What priorities do we want to spend on or save for? How do we feel about our financial trajectory? What is our 5-year net worth goal? What are our retirement goals? What will steps do we need to take to move closer to those goals this year? What does our charitable giving look like? Which organizations would we like to target in the coming year? What are our "money we raise" goals for the year? What are our savings goals? How much did we save last year? Was it adequate? What would we like to save for this year? How often should we set money aside, and where should we put it?

Review Your Household Budget

Are we spending the right amounts on things like our house, our vacations, clothes, eating out, our cars, etc.? Do we need to start saving for any big ticket items like a car or a house or major household repairs? Do we want to send our children to private school? How much will that cost? Do we need to allocate additional funds for their college education in a 529? What are our real estate savings goals? Do we want to purchase a real estate investment this year? Are we saving enough in our 401k?

Job Questions

How do we like our jobs? Do we feel useful in our work? Are we getting paid enough?
How is the commute? What are our individual job aspirations for the year?

Business Questions

How much passive income do we have? How much do we need in 5 years? In 20 years? Do we want to start a business? If so, what kind? How are our businesses doing financially? What are the ultimate goals for the businesses?

Final Questions

What are the key habits we want to develop this year as a family and as individuals?

What books do we want to read as a family and as individuals?

What is the One Thing we want to prioritize the most this year in our relationship?