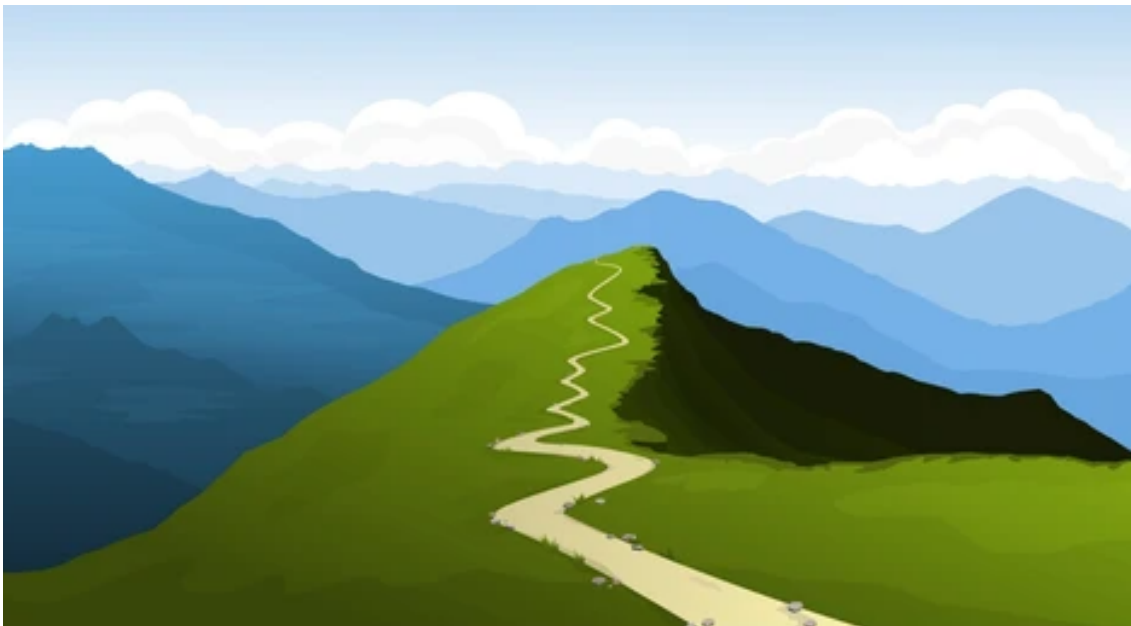


# **GOAL SETTING & HABIT FORMATION: EXPERT INSIGHTS FOR LASTING CHANGE**



**February 20, 2026  
CATCA**



# Goal Setting & Habit Formation Workbook

## Section 1: Pre-Assessment

What are your current thoughts about habit formation?

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List three habits you'd like to develop:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## Section 2: Understanding Your Tendency

Read the descriptions below and check which tendency best describes you:

- **Upholders:** Meet inner and outer expectations, *“discipline is my freedom”*
- **Questioners:** Meet inner expectations, *“keeping an eye on why”*
- **Obligers:** Meet outer expectations, *“you can count on me, and I’m counting on you to count on me”*
- **Rebels:** Resist all expectations
- Understanding your tendency helps choose effective strategies, *“you can’t make me, and neither can I”*

**Upholder:**

Key characteristics I identify with:

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**Questioner:**

Key characteristics I identify with:

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**Obliger:**

Key characteristics I identify with:

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**Rebel:**

Key characteristics I identify with:

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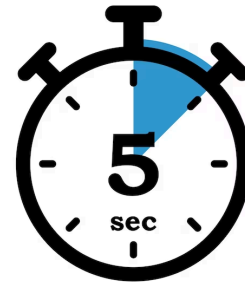
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### Section 3: The 5-Second Rule

- Count backward: 5-4-3-2-1
- Physical movement interrupts mental hesitation
- Bridges the gap between intention and action
- Works by engaging prefrontal cortex
- Prevents overthinking and procrastination



### Practice Log

Situation	Used 5-4-3-2-1	Outcome

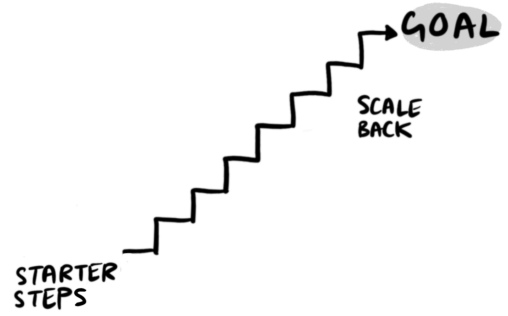
## Section 4: Habit Stacking Planning

Current habit: \_\_\_\_\_

New habit to stack: \_\_\_\_\_

Trigger point: \_\_\_\_\_

Draw your habit stack chain:



## Section 5: Jake Knapp's Slacker Method

Choose ONE goal:

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Break it down into "ridiculously small" steps:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

My specific trigger will be:

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I will track it by: \_\_\_\_\_

## Section 6: Environment Design

Draw or describe your current environment:

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List three environmental changes to support your habit:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Section 7: Implementation Planning

Morning Routine Design:

**Time:**

**Activity:**

Time:	Activity:

## Section 8: Tracking Tools

Which tools will you use? (Check all that apply)

- Digital app (Name: \_\_\_\_\_)
- Paper journal
- Visual calendar
- Accountability partner
- Other: \_\_\_\_\_

## Section 9: Obstacle Planning

**Potential Obstacle:**

**Solution Strategy:**

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## Section 10: Success Metrics & Celebration Plan

Define what success looks like:

30 days: \_\_\_\_\_

60 days: \_\_\_\_\_

90 days: \_\_\_\_\_

How will you celebrate milestones?

Small wins: \_\_\_\_\_

Medium wins: \_\_\_\_\_

Big wins: \_\_\_\_\_

## Weekly Reflection Log

Week of: \_\_\_\_\_

What worked well?

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What needs adjustment?

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Next week's focus:

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### Monthly Progress Review

Month: \_\_\_\_\_

Habit consistency rating (1-10): \_\_\_\_\_

Key learnings:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Next month's adjustments:

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### Resources & Notes

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### Commitment Contract

I, \_\_\_\_\_, commit to working on my chosen habit of \_\_\_\_\_  
\_\_\_\_\_ for the next 30 days.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness: \_\_\_\_\_

# The Slacker's Guide to New Year's Resolutions That Stick

My Unscientific 5-Step Recipe 

My New Year's Resolutions used to fail every time.

For example, I set a resolution to “Exercise more.” I vaguely imagined running marathons and wearing headbands. Then in January, I took two or three long runs and forgot about the resolution. It was sorta like that every year.

Then one year I read [\*The Happiness Project\*](#) by Gretchen Rubin, and was quite taken by this line:

***“What you do every day matters more than what you do once in a while.”***

Huh, I thought.

The next January, I made a resolution to “**Run every day.**” To exercise daily, I had to change my mindset. I couldn't be too hard on myself — if there were only ten minutes, then a ten minute run had to be okay. In other words, I had to be a bit of a slacker.

## **It worked!**

Building a small daily habit was way easier than a big sometimes habit. Don't get me wrong, it wasn't like magic. I fell off the wagon several times, but each time I managed to get back on. Since the goal was doable, if I missed a day or two, I didn't have to break the ice when I resumed. It worked, and the habit stuck!

Next, I tried a New Year's Resolution for writing. Previously, I'd only bothered writing if I had at least 90 minutes of uninterrupted time (which is pretty rare). Using my new slacker method, I resolved to **“Write every day, even just ten minutes.”**

Again, it was easier to stay in rhythm, and the habit stuck. (Although I had to get a little [creative](#) to stay focused.)

I even tried this approach with meditating, which always seemed like The Hardest Thing In The World. To make it a daily habit, I downgraded my expectations. I didn't wake up early. I didn't meditate for 60 minutes. I didn't force myself to sit in silence on a zen pillow.

Instead (nerd alert!) I just used [Headspace](#) for every day, on the bus or even while I was falling asleep. And I decided that even ten minutes of meditation “counted.” The habit stuck.

Sometimes the magic doesn't work. Sometimes I'll keep the same resolution two or three years in a row before it sticks. (*This year I'll finally stretch my hamstrings!*) Still, for me, getting even 50% of my resolutions to stick is pretty good.

So take it for what it's worth. But if you've been frustrated with resolutions in the past, consider applying my Unscientific 5-Step Recipe:

### **1. Dial it back**

Don't be too ambitious. Like, do you *really* want to run a marathon? I mean, you've seen people at the end of marathons, right? They look pretty tired.

Seriously though, we have a culture of intense expectations, and many of us are too hard on ourselves. It's okay to dial back your goal and make it more doable. Resolving to read 500 books is admirable... but resolving to make (or maintain) a daily reading habit is also great.

## 2. Make it very specific (trigger)

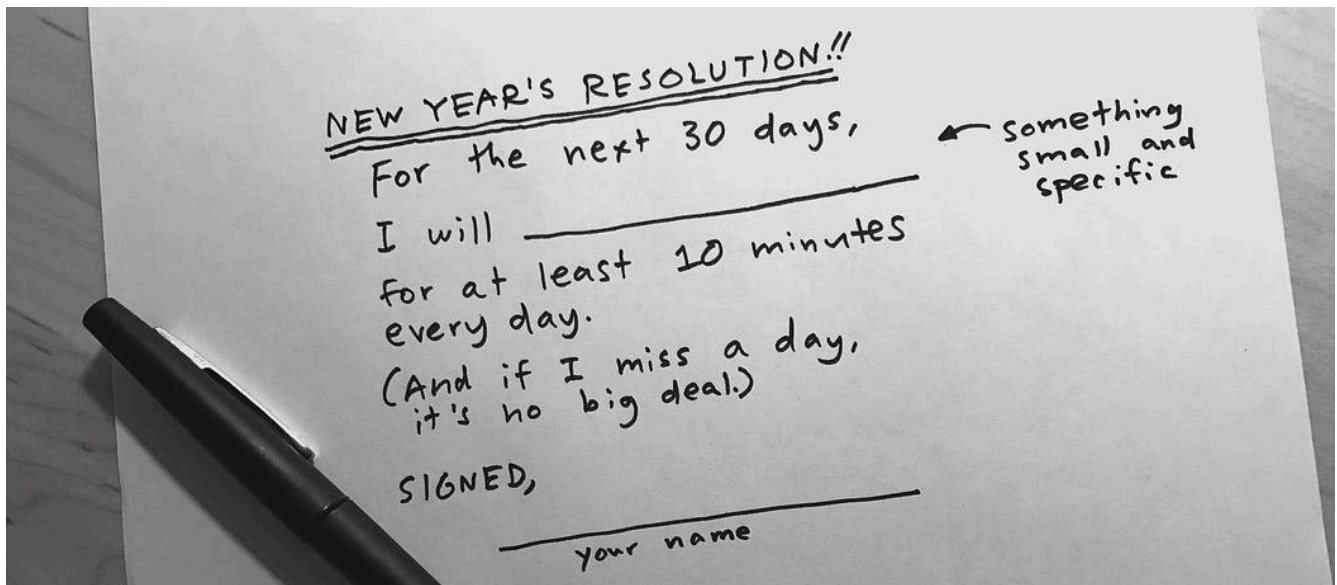
My "Exercise more" resolution is a prime example of way-too-vague. "Run every day" is better, "Run around the park in the morning" is better still. Best of all would be something like "Exercise every day, ideally running in the morning, but other forms of exercise and other times of day are also cool." You get the idea.

## 3. Add the magic words "for at least ten minutes every day"

If you decide ten minutes a day is enough to count, you'll find it way easier to do it every day. And if you do it every day, it's way easier to keep the habit.

## 4. Do it every day for a month

Don't think about all 365 days at once. If you make it through January (or any 30 consecutive days), there's a pretty good chance the habit will stick for the year. And by all means, track what you're doing to make it visible, (and reinforcing because so). If you don't believe me, [ask Jerry Seinfeld](#).



## **5. Be nice to yourself if you miss a day or two**

Just start again. In fact, if you miss a day or two but get right back on it, you don't even have to count it as breaking your 30-day streak. I hereby grant you permission!

Who knows, your small habit might set the foundation for bigger things. But don't worry about it in January. Be kind to yourself as you maintain the rhythm, and let the good things happen. They will.

Now go write yourself a nice doable resolution. Good luck, fellow slacker—you got this!