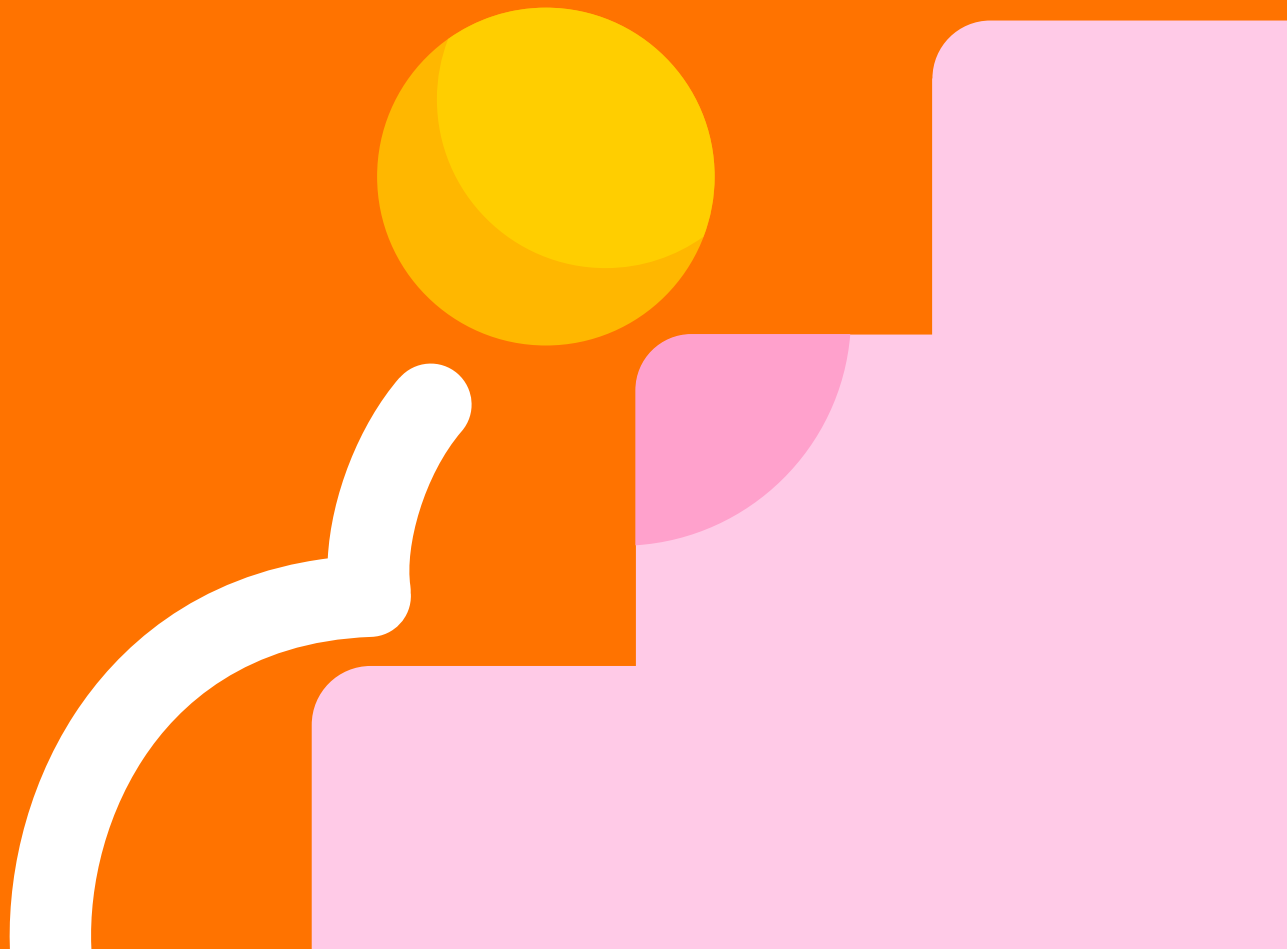




Goal-Setting Guide

A toolkit to support your
physical and mental health



How to register for Headspace



Full-time and part-time Associates have access to Headspace at no cost. To register, log in to compassgroup.bswift.com and click "Headspace" to get started.

Setting health goals that truly matter to you — not just the ones you feel you “should” set — can lead to positive changes in both your physical and mental well-being. When your goals align with your values, it’s easier to stay motivated and follow through, even when challenges come up. Your habits and positive steps become more than just things to check off a list; they become real commitments to yourself and the life you want.

We’ve created this guide to help you set goals that align with your values, support your physical and mental health, and guide you toward lasting, positive change.

This guide includes:

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| Steps for Setting Impactful Goals | 3 |
| Practical guidance on how to create meaningful, actionable goals. | |
| Connection Exercise | 4 |
| A mindfulness exercise to help you ground yourself and align your goals with your values. | |
| Reflection Questions | 5 |
| Prompts to help you think through where you are now and identify areas of growth. | |
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| A space to define clear, actionable, health-related goals for the year and track your progress. | |

Steps for Setting Impactful Goals

Setting goals is more than just jotting down what you want to achieve — it's about connecting with your values, creating a plan, and preparing for the bumps along the way.

1

Reflect on your current state

Start by checking in with yourself, both physically and mentally. Where do you feel balanced and strong? Where could you use more attention? Consider things like stress levels, energy, and sleep quality. A quick [Body Scan meditation](#) can help you tune in and notice what's going on beneath the surface.

2

Connect to your values

Take time to reflect on your core values (we've provided a quick, helpful exercise to do this in the next section). When your goals reflect what's important to you, and align with what matters most, they become easier to commit to.

3

Keep it simple and achievable

Big changes happen through small, consistent steps. Set goals that are realistic but still challenge you to grow. By focusing on one or two meaningful actions at a time, you'll be able to build lasting habits without feeling overwhelmed.

4

Plan for obstacles

Challenges are inevitable, but planning for them can help you stay on track. Think about potential obstacles that could come up and what tools, support, or habits will help you overcome them. Maybe it's making time for self-care, being flexible with your approach when life gets hectic, or watching a Headspace video on [Handling Setbacks](#).


5


Get support

Think about what will keep you motivated and consistent throughout the year. Whether you check in with a friend or family member or use the Headspace app to track your daily mindfulness practice, having a way to reflect and measure your progress can make a big difference.

More Resources:

 **Video:** [Setting Goals](#)

 **Video:** [A Non-Striving Approach](#)

 **Expert Guidance:** [The Science Behind Motivation](#)

Connection Exercise

Before diving into this workbook, take a few moments to pause and connect with yourself. A short mindfulness exercise or guided meditation can help you clear your mind and focus on what truly matters.

**If you have
2 minutes...**

Meditation: Breathe

**If you have
6 minutes...**

Meditation: Time for Me

**If you have
10 minutes...**

Connecting Mind and Body

Reflection Questions

Kick off your goal-setting process by answering a few thoughtful questions. Reflecting on your current state and values will ensure your goals are meaningful and aligned with your well-being.

How have I felt physically and mentally over the past few weeks?

Take stock of your current state to understand what areas you'd like to focus on.

What are my deepest held values?

Choose three to five values that resonate most with you. These will guide your goals and keep you grounded in what truly matters. Here's a list to help inspire you, plus spaces to fill in your own:

- Personal growth
- Balance
- Connection
- Gratitude
- Being there for my family and friends
- Creativity
- Courage
- Patience
- Spirituality
- Honesty
- Adventure
- Compassion
- Rest and relaxation
- Joy
- Learning & knowledge
- Resilience
- Presence
- Purpose
- Sustainability
- Consistency
- Kindness
- Fun
- Community
- Service to others
-
-
-
-



What changes do I want to see by the end of this year?

Based on how you're feeling now and the values you want to stay true to, jot down the specific areas of your physical and mental health you'd like to improve.



How will I feel once I've made these changes?

Take a moment to close your eyes and visualize what your life looks and feels like once you've made progress on your goals. How do you feel? Jot down a few notes about how your future self may feel and the positive impact these changes will have on your life.



What is holding me back right now?

Identify any barriers – whether external circumstances or internal habits – that may be preventing you from making progress. What can you do to let go of these obstacles?



What helps me stay accountable?

Accountability can come from many sources: a supportive friend, a regular journaling practice, or even using the Headspace app. What tools or people will help you stay committed to your goals?

Goal-Setting Guide

Now that you've reflected on your values, it's time to set a few health-related goals for the year. (We recommend picking just one or two to start.) Keep them simple, clear, and actionable, and remember to revisit these goals throughout the year to make adjustments as needed and track your progress.

Sample Goal	Improve my sleep
Target timeline	Get 8 hours of sleep at least 5 days per week by the end of the month
Steps to achieve it	<ul style="list-style-type: none"> Put screens away one hour before bed Listen to a Headspace sleepcast or calming music to wind down Talk to my doctor about my sleep patterns
How achieving this goal will make me feel	<ul style="list-style-type: none"> Rested and refreshed in the morning Focused at work Calmer and more present with my family
How I plan to track and stay accountable	<ul style="list-style-type: none"> Track my sleep quality daily Set an alarm to remind me to turn off my digital devices

Goal #1

Target timeline	
Steps to achieve it	
How achieving this goal will make me feel	
How I plan to track and stay accountable	


Goal #2


Target timeline	
Steps to achieve it	
How achieving this goal will make me feel	
How I plan to track and stay accountable	


Goal #3

Target timeline	
Steps to achieve it	
How achieving this goal will make me feel	
How I plan to track and stay accountable	

More Resources:

 **Mindful Activity:** [What Are Your Small Steps?](#)

 **Video:** [Creating Lasting Habits](#)

 **Meditation:** [Be Patient With Your Progress](#)