

Ep. 90 - Goal Setting for the New Year with Kim Jones and Samantha Lane - Episode Transcript

Leah: Welcome to Her Story of Success, a podcast featuring stories from influential women trailblazers and business leaders who have defined & pursued their own versions of success and fulfillment. We hope these stories, lessons learned, and celebrations inspire you to believe in yourself and enjoy your own journey a little more. I'm Leah Glover Hayes, your host and CEO of Her Story of Success Women's Business and Media Collective.

As we come to the end of 2020 and start to look ahead to the new year, I wanted to provide you with some inspiration and practical advice about how to set effective goals, so you can start 2021 with a mindset that will help you achieve your version of success. In today's episode, I'm going to be talking with two different coaches who have some amazing insight into the process of goal setting that way no matter if you are in transition or already where you want to be, you will hear something that you can use to set yourself up for success.

First, I'll be interviewing Kim Jones. Kim is a career transformation coach, and she's the founder and CEO of Kim Jones Alliance. Kim explains how she works with women to help them remake their careers on their own terms whether you are wanting to leave corporate America for entrepreneurship or if you are trying to find what you are even passionate about to learn to pursue..She gives some exercises and questions you can ask yourself to start that process of setting goals to transition or change your career path. And be sure to stick around for the second half of this episode, when I'll be talking with coach and Origami Day founder Samantha Lane.

I hope you enjoy this goal-setting episode with Kim Jones and Samantha Lane!

Well welcome Kim Jones to Her Story of Success. We are excited to have you today.

Kim: Thank you so much, Leah. It is an absolute honor to be here. I am a big fan of the podcast. And so thank you.

Leah: Absolutely. And you were recommended to us via LinkedIn. I love that platform because I'm like, "Hey, I'm looking for career coaches, transition coaches". So we have so much to cover with you talking about women looking to transition their careers.

And I want you to talk about what that might look like and who you're speaking to today. What are the situations that you're finding your clients are coming to you to talk about transitioning and really the goal setting behind how to take the steps to make that transition?

Kim: Yeah. Yeah. It's actually really interesting. I have been noticing that there are so many women right now who are taking this moment of extreme disruption that we're experiencing, in our social environment and our political environment, to really rethink the decisions that they've made with their life. So a lot of these women have been in fairly stable situations. They have careers that meet all external definitions of success, but there's something in them that might be pulling them into questions about whether this is as fulfilling as they had hoped and whether this is really the path that they want to stay on long-term. And this might actually be exacerbated by the fact that the work situation is no longer as sustainable in the current environment as maybe it had been pre-COVID, for example. So a lot of people find themselves burdened by extra responsibilities or finding themselves in work environments where challenges are magnified because of communication issues due to the virtual nature of work. Or that they're not able to be present for their families that may not have the same kind of support systems available to them in this particular environment. So what I find is that periods of disruption tend to be great moments for people to transform, for a couple of reasons. First of all, it's pretty easy to ignore that voice inside that tells you that perhaps this isn't all it's cracked out to be. We tend to have great ways of talking ourselves into pushing ahead with a path that we've started on, even if it no longer works for us or we think that perhaps we want something more.

Leah: Let's pause on that for a moment before you keep going, because that's so important. And I want to dive into that a little bit deeper, because let's talk about when you start working with someone that's pushed it away for so long. What are the reasons that women push that desire, that pull? What is it that makes them push that away?

Kim: Oh my gosh. I have been studying this very question myself, because I ignored the pull myself, the push, the pull to do something different for twenty-five years and it was through

Leah: Twenty-five years. Kim. OK.

Kim: Twenty-five years. Yeah. I soldiered on in my corporate career, I had a great job as a senior executive for a Fortune 250 company in their IT department. And by all measures of success, I had made it. And so it felt a little bit crazy to think that I

wanted to go in a completely different direction, but I woke up to the fact that I couldn't ignore this question anymore when personal situations happened in my life, very dramatic and significant personal situations that really forced me into a question of whether I wanted to continue on this path, and also really highlighted for me that I could no longer manage the demands of the job and the emotional requirements of it alongside the emotional toll that was taking place in my life. So just for context, six years ago, a beloved sibling, my brother, died unexpectedly of a catastrophic heart attack. Nine months later, a member of my immediate family, very dear to me, was diagnosed with a terminal illness. And a couple years later, a dear friend of mine had an untimely death due to aggressive cancer. And so when all of these things were happening in my life, it was causing seismic shifts in my relationships, in my own emotional state, I didn't feel like I could show up in the same way to work, I didn't feel like I could show up as myself because of the responsibilities that I had. So I really felt this corporate mask part of my identity coming out so much more, which was wearing the professional identity and keeping parts of yourself, sort of obscured in order to do the things that you believe are expected of you, which also included continuing to work through the difficulty, not speaking about it. But through all of that, I came to realize lies that this was no longer sustainable for me, for a few reasons. One is because it wasn't, it didn't carry the meaning and the purpose and the fulfillment that I was looking for, but also because I needed to start attending to other parts of my life that quite honestly, I'd atrophied over the years. Because I had disconnected very much from the parts of me that were about truth and authenticity and my purpose.

So back to your question about why is this such a common thing for, for women? What I learned after leaving my job with no idea what I would do next, because again, I was so disconnected from what it was that I was really interested in doing. I actually went on a little bit of what I would call a knowledge quest to really understand the role of life transformations in human development. And I was also interested in our conditioning and the culture that we live in and how that influences our, either ability or lack of ability to move forward with pursuing our own transformations. So what I learned, interestingly enough, is that culture plays a really big part in so many people feeling stuck and dissatisfied. So if you think about it, we all, myself included and I'm sure most of your, many of your listeners are conditioned from a very young age to pursue a path of success that is very culturally defined around very narrow jobs that meet that external definition of what we should be doing with our lives. This idea of work above everything else, this idea that we are our professional identity. So who we are equates to what we do. This idea of a linear progression and constant forward progress, which is actually very different than

what life transformation looks like, which is all about shifting when your life priorities shift. So if we think about what's important to us when we're in our twenties, it might be stability and having certain financial resources, whereas as we get older, it might be more about moving up that hierarchy to things like purpose, fulfillment and finding meaning and purpose. And so I learned very quickly that, you know, while we progress through our lives, if we don't heed the call to make the changes in line with our shifting priorities, in line with our desire to reach our full potential, in line with achieving our purpose, then we can very quickly find ourselves in that place of feeling stuck. Like, "I need to solve this pull that I have to redefine who I am, but I don't feel like I can get off this path because I have all these cultural messages telling me that that's not how you're supposed to do it." And with women, what's particularly interesting is we have this added burden of our gender conditioning, which basically tells us that we should be grateful and not deserving, that we should serve others before we serve ourselves. So this idea that we would step into bold and audacious and big lives in order to fulfill what we consider to be important to us is sort of anathema to who we're taught to be. And so we learn not to trust what we want for ourselves, so we've really disconnected from those, those messages of what it is that we actually want to be doing with our time on this planet.

Leah: So when you have women come to you or, I mean, I'm sure you've done other of these episodes, what is it that women get to, when they reach out to you? Because you said you ignored it for 25 years, and it took a tragedy. So what is it that you're helping women realize before they get to a tragedy, so that they can see, "Oh, this is something that I can do before I need to, before I burn out." And I'm sure that not everyone is transitioning into entrepreneurship. Entrepreneurship is not for everyone. So I'd love for you to talk about women that you've worked with that maybe transitioned careers, not necessarily leave corporate America and go into entrepreneurship. Because I know there's a lot of, a lot of women that listen to this, that like my sister, for example, she's kind of in that like, "I think I want to transition into something. I don't know what it is." So what do you start with when you have someone that's like, "I went to school for this. This is what I knew that I wanted to do because I am passionate about it. But now that I've been doing it either, I'm jaded, I'm in an unhealthy work environment." Or maybe, you know, when you start out doing something and you have kids, your whole life changes. So people come to you and you say, "Okay, start." Are there questions that you ask them to dig deeper on or are there exercises, what does that kind of look like for starting this process of looking for a transition?

Kim: I think the most important thing is helping people to understand that this is completely normal within the context of how many people progress and evolve over

the course of their lives, and that there is great reward, benefits, fulfillment on the other side of it. So generally what I start with, in helping clients find their way through these questions is what is it about their environment that is currently causing them to feel this pull? And what's important to them now? So we really start with what does an ideal life, what is the biggest, most audacious life that you can imagine? And what that tends to bring up for a lot of people is their limiting stories, like, "Well, I can't think about that because I have bills to pay." Or, "Only a very small handful of people get to do what they actually love. And it's work. It's not supposed to be fun". So we have to really work through those limiting beliefs and shift them into beliefs about possibility and that idea that it is possible to start to create and build a life for them. That's huge.

So really, it always starts, and this is where my coaching tends to deviate a little bit from traditional career coaching, which is all about taking action. And eventually action is absolutely the path to transformation, but it really starts with inner transformation first. The inner transformation is really about unearthing those thoughts and beliefs that have led them down the path that they're on now that has led them to become dissatisfied. And that might just be shifting priorities, but it could also be again, because we've all bought into some of these cultural ideas that don't align with who we truly are and what's authentic to us. So the way that I like to approach it with clients is, let's just assume that a possibility mindset and open field is available to you. If you can't picture what it is that you want to do, likely it's because your beliefs are, are constraining you from even being able to open up to different thought patterns of what might be most fulfilling to you. So that's very typical. And so what we then start with is, "Well, then tell me what your ideal day looks like. Forget about what it is that you, you think you want to do vocationally. How much freedom do you want with your time? How are you feeling? What's your environment look like? What kinds of people are you surrounding yourself with? What type of problem are you solving?" You know, starting a lot smaller, because, I found too, that people have this idea of career purpose with a capital P, meaning that it's some passion that we were all born to do. And it's one thing. And often what career purpose actually means for people is more of a small p, a lowercase p career purpose, which is following your curiosity, finding out what energizes you, finding out what motivates you to do anything from serve a community to solve a problem that is something that you care deeply about. It can be about connecting with people and being around a certain type of like-minded person that energizes you. So we start with those questions before we go bigger. So again, we're looking at the internal landscape and then really building the internal scaffolding around ideas that many of us have that keep us stuck. Like we're not worthy of a life that we really want, or that I can't get paid to

doing what I really want, or that people won't take me seriously, or I'll lose connections and relationships with people that are important to me if I step out and do something different. So we have to look at all of that. And so that's really the first place that we start.

Leah: Wow. I love this because as you're speaking, I can see where I did all of this work to get to where I am having my own company, doing what I love, having conversations and sharing that with people. And it fills my soul so much to know that this might help another woman get in that position where she's truly fulfilling and doing what she loves. And what is beautiful also is, I realize that as I went through this process, I was single. I mean, until I married my husband and continued on the process, but this has been happening for a long time. I was single, I didn't have responsibilities outside of myself. Once I got married, I was married to a very, very, very supportive man that wants me to be happy and pursues my dreams. So I'm very blessed in my ability in the way that I was able to do those things, because I had the capacity, and I didn't have other burdens. Let's talk for a second for that woman that has three kids. And maybe it's not just her own self doubt, but maybe her spouse is scared too.

Kim: Yeah.

Leah: And I will say when, one of the times when I was about to jump, like I was going to, I was ready to quit my job. I'm ready to like, do this. And I will say my super supportive husband was like, "What if you don't quit today? What if we like make a plan?" He helped me like make a plan. But what I realized was I needed to sell him on at least a framework of a plan so that he would feel comfortable in us, me taking a leap isn't just about me, because we're married, we're a unit. So what about that woman that is wanting to transition, but she has a spouse that either is not supportive or is scared also about the change or the transition?

Kim: Yeah, it's a really, it's a very real thing. Transitions affect more than just the person that are making them, and what I have found can work really well is to take steps that are less threatening, which can be just defining what it is that's interesting to you, taking a class, exploring a new community, reading books, listening to podcasts, and then starting to take some steps that are more aligned with interest versus large vocational change. What usually happens is by starting to align with things that interest you, you do start to be presented with opportunities that might align more with something that can then be a little bit more monetized.

So what I often see is people want to come in, they're unhappy, they're looking to actually jump ship and leave their jobs and get started with something new, but

really again, if we shift the focus towards what you really are experiencing is dissatisfaction with where you are now, and you can start to build satisfaction around the job itself, which will then help clarify the path more as you move forward. So I think those are some safe things that you can do that allow you to move forward with purpose and with interest and not completely upset the apple cart. But then I think it's also important to have the conversations with the people in your lives to really expose them to the bigger picture of what it means to look to do more meaningful work. As I mentioned, that these are paths that are common, they're very much about achieving your human potential. And so setting the example of making that movement and taking steps that allow progress can oftentimes help people in your life start to come on board with what it is that you're doing. Like you mentioned that you came back with a plan and you had probably I'm guessing, cause this is very common, like I'm going to take X amount of time to make it work. And if it doesn't work within this amount of time, then I've got all these other skills that I can fall back on and I can, so a lot of times it can be about that too, is really laying out some kind of a high-risk or medium-risk way of testing the waters with a backup plan.

Leah: I love that

Kim: Of okay, if this doesn't work, then we have a fallback.

Leah: Right. I think the other piece that was important for me and that I like kind of encourage other people to look at is, this isn't going to be the first risk that you took. I think sometimes we forget all of the things that we've achieved to get to where we are today because we just focus on like, "Oh, I'm so unhappy. And like, I did all these things and I worked really hard and I'm here." And you look at the, like the discontentment, but you forget like, did you move? Have you ever moved to another city? Did you go to college? Like that's a risk in itself, right? Like what are the things that you can look at as foundational? "I already did this risk and here was the reward," so that you can see, "Oh, I've done that before." And looking at how you navigated it can give you the confidence to say, "Oh, this isn't something new. It's just different." Right? Like, there's no way this is going to be your first transition, unless you're like 18, right? Like any of us that have worked in the world for a minute, have you ever taken a new job? Have you ever gone for a promotion or did you go through a tragedy? Have you had a job loss?

Let's talk a little bit right now for the woman that has had a job loss, maybe because that can hurt your confidence so much. So do want to talk about, if you either got laid off or, you know, maybe you've lost clients, or your position isn't as good or whatever word that you want to use as it has been in the past. And for that woman, that's

needing to either push forward or take this time to say sometimes tragedy, sometimes loss, sometimes that is an opportunity to pause, reflect and move forward. So talk to that woman for just a moment.

Kim: Absolutely. That is actually the, the silver lining in forced change, which, job loss COVID, personal tragedy tends to de-center us. It knocks us right out of our, our sense of stability, which our sense of stability is often what keeps us stuck. So we think in those moments where things are going well, well, you know, why would I change now, because there's great risk? Whereas if you have been forced into a situation that's beyond your own choosing, that can actually bring up a lot of different ways of approaching things that you're not necessarily going to be as inclined to do. So you're already in a period of uncertainty. So looking at this as an opportunity to start thinking about what it is that you actually are really looking for in your next career, not just, let me go jump unless financially there's need to do that, but then let's still map out that longer term plan, get that short-term job, but let's look at where you want to go long-term. But I think the important thing here is that periods of transition call forth incredible creativity and resiliency in people. So you start to discover resources that maybe you didn't have access to. And the other thing you mentioned about, we've all been there and transitioned at one point or another. What tends to happen is that when we get established and we become experts, we don't want to go back to that newbie again, we don't want to be the novice. It's very vulnerable being on a learning curve, worrying about failure. It's so much easier to take those kinds of risks when you're in a situation where you sort of lost the footing of the position that you were in before. So really shaping that mindset around the opportunity of it and focusing less on what this might mean personally. And this is again, I think where the inner scaffolding is so important. Like what beliefs do you have about yourself that are not serving you in moving forward? Because there are other ways where we can look at this as in terms of possibility, as opposed to, from a perspective of being in a place where it's that much harder to move forward.

Leah: Yeah, let's talk about resources for a minute. Obviously, this podcast is a great one. Anyone looking to get inspired on career change or defining, and I always say in the beginning of it, like this podcast is about defining success and fulfillment for yourself and learning how to pursue it. The conversation that we're having right now is literally the entire reason that I started this podcast, because I was on a journey of trying to like figure out my path, what's my passion and pursue that. So I wanted to share just a couple of books that I have read or am reading currently, that would be helpful. And then I'd love to get a list that you have that you like recommended reading that you have. So one is *Thrive Through It* by Brittany Cole, it's about building resilience. Anyone that has either experienced loss, job loss, any kind of loss, really,

and learning how to move forward. She, like you, literally, her big dream corporate job, lost her mom and talks about that transition. *Believe Bigger*, for anyone that is faith-based. *Believe Bigger* is about removing some of those limited beliefs that you talked about, like how we are made and built to do great things and how to start having confidence in that in ourselves. *It's About Damn Time* by Arlan Hamilton, it's a great one about learning what you love. And then *Overcoming Underearning*, that one is by Barbara Stanny. I have a group of women entrepreneurs that meet together, and we're actually going through that one right now. So this one's a good mindset about how to change your limiting beliefs and learn how to not fear a success like financials. And I, I love it because it is about you don't either pursue your passion or become successful.

Kim: Right.

Leah: You can do both. And obviously that's why you're doing what you do. So I just wanted to hear if you have some recommended reading or classes or, or if you have a book or anything like that, that you would like to mention. I just want to give people some practical, like it is December. Let's start doing this and that way we're in this process of gaining the knowledge and transitioning.

Kim: Yeah. There are some wonderful books and resources available that speak to the process of transition. I love, I recently read Glennon Doyle's *Untamed*, which is an amazing book about connecting with your inner voice and living your life with purpose and boldly and audaciously. And the points that I mentioned around moving past social conditioning to really go after what it is that you want to achieve in this lifetime. Rah Goddess recently published a book called *The Calling*. And that is an excellent resource for exploring what it is that you want to do in your life. So it's, it's a book really geared towards helping people discover and find their purpose and then get paid for it. So that's a great one if you're just starting out and know you want to do something different, but don't know exactly what path to proceed down, anything by Seth Godin. He is absolutely terrific. He, I think combines a really great business perspective with dealing with internal dynamics that tend to hold people back and just gives really solid advice. Marie Forleo's *Everything is Figureoutable* is a terrific book. She, she obviously has done really amazing things in business and has followed her true and authentic voice. And she's got some great tips, again, really mindset-oriented to help people get into the right frame of mind, but it's also very practical of specific things that you can identify that you want to achieve and how to move forward with achieving them. And then of course, Jack Canfield, *The Success Principles* is an absolutely awesome book. There's a workbook now that accompanies the actual book that I purchased recently, and it, it is a great tool and

resource for sort of working you all the way through from purpose to implementation. So that's just a handful that I come up with off the top of my head. You mentioned more along the spirituality dimension. I really like Gabby Bernstein as someone to read, to really think about defining and creating a life that is centered, again, around your authentic voice, around service, around alignment and co-creation and around really, building things that are here to serve light in the world, which I love that message so much for people.

Leah: Awesome. I love it. Well, thank you so much for all of the recommendations. I felt like this has been such a good lesson. And even though I've obviously gone through this process because I started my own company, it's such a good reminder of how we can continually check in to our purpose. I think you talked about the big P of purpose and the little p, and how it doesn't matter if you have started your own company or you're working for a company. I think that continual process is really important to not always put so much focus on the big P, but what are the other little things in my life that are really important? And I will say for anyone that, any mom, oh my gosh, you already know you have so much purpose in your kids and your family. For me, I get to see the people that I work with, Claire who just jumped on to help us with a technical issue who's my producer, you know, I get to be a part of, of her life and a mentor to her and she's a mentor to me. So I think being able to really focus on what are the little p's in our life, our purpose that we have on a daily basis is really important. So I appreciate that reminder from you. I do just have two more questions. Go ahead and share where people can find you on the webs and socials. And then I always ask my guests, how do you define success today? And if it's changed, tell us a little about why it's changed.

Kim: Yeah, absolutely. I define success very differently now than I used to. For me in the first part of my life, it was all about achievement and living up to an external definition of success about creating a life that looked great on paper, and really provided me with a sense of accomplishment. That was super important to me, but what I recognized in that process is how much I traded for it. How many parts of myself I disconnected, how many of my priorities were subordinated to living into this external ideal. My definition of success today is actually about really inspiration, contentment, fulfillment. So for me, it's less about how it looks and more about how it feels. So if I'm doing work that gets me up, that lights me up every day, that gets me out of bed, that inspires me, that feels purposeful, that I believe is in contribution to something that I care very deeply about, it's a qualitatively different life. And so all of the things that I felt were so important to me around material success and status is so different for me now in this, this phase of life. And it's been quite an amazing journey. And it's one that I love to guide and assist other women with making so that

they can get to the other side of what can feel very much like a trapped life into very much of an inspired life.

People can find me at kimjonesalliance.com. If you are someone who's interested in getting support for a career transformation, you can book a free discovery call with me right there on my website. And on social, I am mostly on LinkedIn and it's Kimberly S. Jones on LinkedIn. So, you can find me there.

Leah: Great. I am on LinkedIn as well. That's how I found you. So it's great. It's a great tool. Um, awesome. Well, just appreciate your time and sharing your, just your experience and how you help clients. And I just hope that there's one person that listened to this that had a breakthrough or an aha moment, or, um, You know, just the inspiration or motivation that she needed to push forward. So if that's you, if you got inspired by Kim, please leave us a review on iTunes or wherever you listen to podcasts, and let Kim know what you appreciated about, about her sharing with us today. So thank you, Kim. I appreciate you. And, um, we'll hopefully be talking to you again soon.

Kim: Thank you so much, Leah. It was such a pleasure.

Ad: This podcast is sponsored in part by Piccolo Marketing, providing outsourced marketing professionals for business owners. Piccolo Marketing was started by fellow woman entrepreneur, Anna-Vija McClain, and they have become our go-to resource when it comes to comprehensive marketing strategies and execution. So Anna-Vija created Piccolo Marketing Mentor for people like me, as the outsourced VP of marketing to chief marketing officer, depending on the size and needs of your company. How we use them is more like a VP of marketing, and the thing I struggled with is the processes and checklists, the project management of marketing. I felt like I was wearing a lot of hats and juggling a lot of things, so she helps us with the both long and short term marketing strategies, and then providing my team a roadmap and insights that we can go and execute on. Piccolo Marketing Mentor has helped thousands of business owners just like you and me develop our strategies to improve our marketing machine, which is how we get qualified leads and make sales. So to learn more about Piccolo Marketing Mentor, you can visit them online at piccolomarketing.com

Leah: Even if you're not looking to change up your career in 2021, I thought Kim's advice about overcoming limiting beliefs was so powerful for anyone who wants to reach a new level of success. My next guest, Samantha Lane,

is going to be sharing some practical tips and resources you can use to chart out your goals and practice better time management. Samantha is the founder of Origami Day, where she offers speaking, training and consulting services, and also a product line of planners and other time management tools. She's going to explain how you can bring your goals into your day-to-day life with goal planning.

Leah: Well welcome Samantha Lane to Her Story of Success. I'm excited to have you today.

Samantha: Thank you for having me.

Leah: So why don't you share with us, what is Origami Day? And who do you typically work with?

Samantha: Yeah, so Origami Day is a company that I created about almost four years ago. And what I do through that company has helped people to shape their time to live lives that are both productive and balanced. So I help people be present in their lives while still being productive. And I work with individuals as well as progressive companies who are trying to retain employees and great talent while still producing at a very high caliber. And so individuals and companies who just need help with, with managing all the things.

Leah: I love that. And when we talk about time management, one of the pieces of the conversation that I wanted to dive into today is, when we talk about time management, you also are able to help people focus on goal setting and how time management relates to achieving the goals that you have set because you make it part of the strategy. So let's just focus on goal setting. Let's take that woman entrepreneur, we're in December, and maybe she's already set goals. Are she starting to set goals for 2020? What are some of the like first steps that you help people think through as they start to set goals? Whether it be this time of year or just in general?

Samantha: So the thing about goals is we get a lot of support in how to set a goal, but we don't always get a lot of support in how to bring a goal into our daily lives. And so that is something that I really focus on in a concept that I like to call goal planning. So with that, I help people to understand where are we trying to go?

I like to use a staircase analogy. So Leah, you and I are standing at the bottom of a staircase, and December 31st, 2021. Is at the top of that staircase. What is the vision? What does it look like? And so I believe that's the starting point. And so for you to take

some time to establish, what is that vision? That's really where we begin to pull from that goals. So from that vision, maybe you're thinking Her Story of Success is really successful, and there's all these people who've come on the podcast and different events that we've done. Well, then from that, we're going to pull out specific areas to focus on. So maybe one is community building and maybe one is educating. And then from that, we're going to set SMART goals. So essentially what we're building is the steps to that staircase. And then I like to help people incorporate that into your day to day so that you're sort of laying out the steps and then setting yourself up to simply take them one step at a time. So bringing that into your daily calendar, into your time management, instead of just setting a goal and hoping you get there, how do you break that goal down into bite sized pieces to actually reach it.

Leah: I love that. And then what are some of the tools that you work with when helping people go from, okay, I've got this vision, I've got this goal. How do you set the strategy to implement?

Samantha: So I've created a lot of specific downloads and tools within my arsenal, in addition to the Origami Day signature tools. So for people who don't know that, part of my business, is products. And so I have both a weekly folding sheet in the Origami Day name, and then I have a planner and a notebook in one. And so a lot of the way those products were intentionally created, does support goal planning. But in addition to that, I've created a couple different downloads that people can use to take that vision and break it down into goals and break that down into steps for each quarter, each month and each week. And then outside of that, I really like for people to know their strengths and weaknesses, when it comes to time management. And if someone's like, I'm really a digital calendar user, let's talk about how we can really integrate this into your digital calendar. And I believe that you can do both. People always say, "Oh, but you, you run paper products." And I always tell people, "I'm not anti-tech, I'm just pro-paper."

Leah: I love that you said that because I just was listening to an interview with Barack Obama. It was just a cute, short one about his book. And, and they asked them that they're like iPad or yellow pad and he's like, "Yellow pad all the way. I love paper." And I am like, Ooh, my digital calendar. Cause I have like two journals, like at the same time, because I'll forget one and lose one. And so it's like the thought of me having an actual physical planner is like, I literally have started like three this year. So I love that you offer this planner, because a lot of people do like the regular paper planner. I think a lot of people get there's some sort of like physical reaction or like satisfaction of writing things down and physically checking it off.

Samantha: There is.

Leah: But let's talk about that for a minute. So, um, I know you're big on time-blocking, so, okay, we've set a goal for the end of December 31st. Mine personally is going to be making a couple of sales. So like looking at the sales goals of like, okay, by December 31st, I want to, you know, have sold two things. And then what does that look like to time block? I know that you talked about that a lot. So once you actually have your plan, how do you put it into your calendar? If you know, okay. I need to make so many calls by so many days. What does that look like? And how do you have preparation time versus the doing time?

Samantha: Yeah. So what I would, probably what I love to do that, to help people learn, and sort of think about, and a sales goal is a great example. Like someone who maybe isn't a sales role or a business owner themselves, you know, that vision of the top of the staircase could be, I want to have a \$100,000 in revenue at the end of the year. And so then we would say, okay, cool. Time is a measuring unit, not a concept. So how do we look at the reality of time and apply it to that dollar amount? So simple math, we're going to say, okay, \$100,000 at the end of the year? Cool. I'm going to try to hit \$25,000 a quarter. So then you say, well, every quarter has three months. So you're going to take your 25,000 and divide it by three. And now, you know, your sales goal for the month, and then you would bring that into your weekly planning and say, okay, what are the things that help me generate revenue? I need to make sure I sell X amount of planners, or I need to make sure I contact X amount of consulting clients, or I need to speak at X amount of conferences, and you sort of reverse engineer it. And then instead of thinking about it as a giant number, you're really looking at, if I make five phone calls every week and I post three times on Instagram and I do these three events every week, then I am on track to get there a bite at a time. Hopefully that makes sense to answer your question.

Leah: No, it totally does. I love the bite of time, because I think for people like me, like I'm not a super organized person. I don't have this like daily routine that I do every single day. I like would love to tell you that I am. And so like, my husband does like literally his, the exact same process every single morning. I love it. And I think that I'm so jealous that he's just wired that way and can do it, that it makes me feel like a loser of a person. So I want to talk really quickly on two different types of people. Because the person listening, like you're either like, "Oh my gosh, the thought of like getting organized feels so far out of my reach," I am talking to people like me. Yay. And then there's people that are a little bit better and they just need some like practical tools and tips, but like, let's talk to that person. That's like, "Oh my gosh, I've never been organized in my life." I want to maybe have you share a story of someone

that you've worked with that's really struggled with like, learning how to set their schedule and really commit to it and follow through with it.

Samantha: I can actually think of so many examples. So what I like to do when I work with people on the consulting side and educating side is really understand who they are and where they're coming from. Because if I don't know what's moving you each day, it's hard for me to make recommendations. So I like to have do assessments. So sort of the Myers-Briggs or Enneagram, it's just to help me understand a little bit more about their styles. So I recently worked with a client who is an individual consultant client, who, we did the Gretchen Rubin Four Tendencies. I'm not sure if you're familiar with that, but long and short is, Gretchen Rubin says that there are four tendencies that make up the way you respond to expectations. So you have your upholder who is driven by internal and external expectations. You have your questioner, who's very driven by internal, but they're not so worried about external expectations. You have your obliger, which makes up the majority of the population. And these are people who are very concerned about external expectations. You know, they're the people who will let down themselves before they let down someone else. And then you have your rebel, and your rebel as someone who wants to counter both internal and external expectations. So this particular client was a rebel.

Leah: Okay. That's me. Okay. I feel like you're talking about me. All of those I'm like, and then I'm like, okay, that's me. Yep.

Samantha: And, you know, everyone is different and we're all made the way we're supposed to be. So it's interesting for me to try to apply the things that I've seen work with myself with other upholders, which is me, with other obligers or questioners. And so a rebel is a really big challenge for me because it's the exact opposite. So what was neat was just sort of, kind of guiding this person through the reality that they say, "Listen, I need structure. I know I do." So we really spend some time bringing them a little bit closer to structure. And we've worked together over the course of probably three months now. And normally when I consult with someone, in the very beginning week, we create a weekly template, which kind of touches on that time-blocking that you mentioned, and we identify what sort of blocks of work are essential to success. And we plot them in a way that respects their, you know, different parts of our personality, productivity, time, introvert, extrovert, things like that.

Leah: I love it.

Samantha: It's very helpful. With this person, I knew that they could not as a rebel, we could not come out the gate with the weekly template.

Leah: Ooh, I love, cause I know I was thinking that too. I'm like, ooh, you get me on a weekly thing right now. Like we got to ease in girl. We got to ease in.

Samantha: What we did was we first said, every Friday, make a plan for the next week, put whatever you want on it. And we sort of just got into the habit of planning, and then we'd start saying, okay, each day you care about these and these things, let's make sure you integrate that one habit, which for this person was reading. So let's make sure you read every day. We just kind of slowly started building those habits, and then today, we had a discussion and through some changes in life, there was more overstimulation. And today we made a weekly template for this person, because we realized, they realized that it was time, and that needed a little bit more structure. And so it was, it was really neat to kind of go through that journey and know where they were strong and comfortable and where they just kind of, everyone has a different comfort level with change. So helping to understand, you know, their change, their comfort in their own choices and respect or less respect for structure.

Leah: Right. What I want you listening to here is, this is very personal. And if you're like me, and you have struggled with goal setting and like, this is a huge topic. Like everyone, every leader, every company talks about goal setting. And so what I'm hoping that you're hearing is there's hope for you, no matter what personality type you are, do you like paper, do you like technology? So I really encourage you to kind of check out Origami Day, because she has a lot of options. So I appreciate the fact that you're like, "Okay, it doesn't matter your personality type. We can figure something out, but it does matter your personality type to figure out what works for you." And honestly, for me, like, even as we started this conversation, like in literally in my stomach, when I think about the structure and goal setting and all the things that I'm doing, air quotes like that I "should" do or need to do to be successful, tight? I have feelings of shame, anxiety, guilt, and like, I think shame would be the best thing, because it's like, you know, I'm close to 40, I own my own business, I've been in business for a long time and I just get that shame of like, I should be better. I should know better. I should know how to do these things by now. Right? Like this should be something that I do. And so if that's you, if you've ever like, felt guilty about, people call it, should-ing all over yourself. Like that's why I'm doing this podcast. I was like, I want you to hear that there's different ways to do it. And it's about finding what works for you. And we're going to put some links in the show notes of what's Samantha's talked about with the different personality types and some of the products that she has for different people.

So this rebel that you worked with finally got to where you could get the weekly plan. How do you help someone develop that new either mind shift or skill that they don't really have? How do you help people do that? What does that look like?

Samantha: Well, and I think you nailed it when you said the word mindset. I do not want to sound like a jerk when I say this, but I know right away, if I can help people or if I can't help them. And the ones that I can't help, it's actually not my choice. It's theirs. And I use the word choice, because I also believe that we have choice. Not everyone has choice in everything that we do, but on a daily basis, we do have a lot of choices, especially as it pertains to where our time and our energy goes. And I believe that anything is possible. It's just a matter of how we get there.

And so with that mindset, mine did not come overnight. I used to be such a workaholic, and I did not manage my time. Well, of course I got stuff done, but in a very, a tornadic self-destructive kind of way. And so it took a very powerful life-changing experience for me to rewrite my days and shift my life. And so part of my struggle as a time management consultant and as someone who's really trying to spark a larger shift than just managing your days better, my biggest struggle comes in helping people to have the powerful epiphany that I had without having to have the surgery that I had.

Leah: Right. Like a trauma to go through. Yeah.

Samantha: Exactly. This pandemic has actually been helpful in some ways, because I think it is similar to what I went through. And I think a lot of people are suddenly in this weird position of their calendar was first stripped away of all the commitments they had, and now we're sort of in the rebuilding stage. So I think there's a lot of opportunity for people to manage their time better. And it really comes down to, what do you want? Because at the end of the day, our time is finite. We can't make any more, and we don't even know how much we have. And so really thinking about what you care the most about is really a starting place, because if you can care about something so deeply that you're willing to make changes in your daily life. You're willing to make changes in your calendar. You're willing to shift habits and hold yourself more accountable, if we know what your why is. So that, that staircase, we talked about Leah, when we're standing down at the bottom of it looking up, whatever's at the top has to be so enticing that you're willing to take step after step and check off goal after goal to get there.

Leah: That is so key. And I will tell you, and this isn't about me, but I just want to give an example for the person listening in why that's so important. And I think maybe what's held me back, honestly, even with Her Story of Success and really turning this

into a successful company, is I don't know if this is the right way to say it, but I'm just going to say it and you correct me. I'm not a self-motivated person. And so if it's about me getting money or gaining success, I can't push myself to do it because I should. There has to be something that's like, if you do this, then you can do that. And so when I worked in a sales job, you know, I was making decent money. I was already married. My husband was making good money. And so I didn't have that tie of reaching this super high sales goal for myself, because I was like, I didn't have that tie between the need. Right? Like the, I have to do this. And it was actually an incident with my mom that came up, that I was like, "Oh, hang on. If I reach the sales goal, I'll make this. And then I can pay for this thing for my mom and not have to ask my husband, if we can do that." Do you know what I mean? And so I one hundred percent agree with you. And so I want to kind of stick on that for a second. So let's say somebody has a goal that they have not achieved and they're feeling guilty or that they want to achieve, but they just can't find the motivation to push themselves. And maybe they're feeling guilty or shameful for being like, "But I want to have success. Why am I not pushing for it?" So let's talk about that process of tying the why, (a) in the initial vision, but then how do you make sure that the why stays in to the follow through process as we continue to go on when we're learning to time block or changing that mindset?

Samantha: Well, and I think that's where having some version of accountability, you know, it doesn't have to be me particularly as a coach for someone, but having a community or writing it down. Or another reason I like paper is I encourage people to write stuff down in a place that is kind of hard to hide from

Leah: Maybe like in your, in your line of sight. That's why people use like white boards or posters or, you know, something like that.

Samantha: But with that too, you've got to shake it up because otherwise you look at the same thing day in and day out and you eventually stopped seeing it. And so I think it's important too, for people to be able to have some shuffling so things stay fresh. But part of that too, I think, is putting something out there to the universe. When you say something again, because the majority of our population is an obliher, if you say something and you put it out there, then there's, you know, a certain amount of responsibility so that you don't have to deal with that shame of not getting it done. The other thing is I believe in like setting realistic goals. You know, one of the things that I do that I haven't even mentioned yet is I am very committed to SMART goals, which you've probably heard before, specific measurable, achievable, realistic time bound. And so we set realistic goals. Because I don't want someone to set a goal that is setting themselves up for failure because that will take the whole thing down.

Yeah. We talked about the value of paper, you know, there's scientific studies that show us that writing something down is going to help us remember it and crossing it off is going to help us feel more accomplished. So celebrating those successes, that perpetuates more productivity. So not even just in a daily to do list, but in your goal setting. So I like people to start off in the beginning with sort of really, really reachable goals, not, not sandbagging, but like enough that they're going to get that win and keep going.

So for example, to give you some examples of clients, one of the things that I do with my clients is we always measure on a self-measured scale. It's usually something to do with how they would rank their work-life balance, their time management or their planning, something in that world. And I'm not kidding you, every time I meet with someone, when we get to that second meeting, and sometimes when we get to our eighth meeting, we always go back and we see traction, and people always are increasing. And so even if it's not a very scientific, official way to measure, people are feeling more productive and they're feeling more balanced and they're feeling more empowered, and that I think perpetuates a different way of living their lives and getting things done.

Leah: I think that's a really good point when you talk about either like marking it off the list or like having the goal and then like, seeing movement. I will say, so most of you that listen know that years ago I sold Mary Kay. I still use the product. I do love it. This is not a plug, I just love it, but I became a director and I wanted to earn that free car. The reason that I love something like a Mary Kay, where you have these goals, is they taught me to literally have a poster, and we put a picture of the car up, and then they had lines of like every, to your point of like breaking it down. And so you had lines of like every person that you got on your team, then you write their name down and you could literally like see your progress and how far you had to go at all times. And that goal image was up there. And so I think that there is something about a goal poster, and I think maybe that's what I need to implement, is like my new podcast studio that I'm getting is like, how do I have this like goal poster of either people I want to interview or the companies that I want to work with, so that I can see my progress. Because I think that's one thing that, and I don't know if it's women in general, you know, I hate to generalize things, but we're so hard on ourselves and we can just focus on the amount that we still have to go to reach the goal that sometimes we forget to look to see how far we've come.

Samantha: Oh, absolutely. If anyone has heard me speak ever, one of the things that I just preach about is plan every week. So every Friday, and we can talk about why, but every Friday, make a written plan for the next week. It is one of my like recurring

mantras. And one of the things that I've integrated into my weekly planning habit that I recommend everybody do is during that time that you sit down and you map out your plan for the next week, look back at the week you are wrapping up and celebrate your successes. In some way. And so what I do is I write those down in my planner, so that I always have sort of that, that visual record of accomplishments. And then even at the end of the year, when everyone's getting into this new year's mode and they're like, "Yay. You know, like it's a new year, but wait, what did I do?" Then you have a record of all the things you accomplished. And it's also really helpful for anyone who is employed by someone else. Because then when it comes to review time, you actually have all these successes. Or even someone who's doing a business by themselves. And you're like, "I feel like I hustled so hard in this year, but what do I have to show for it?" Well, here's your, your list of successes. So I write them down every single Friday, and it just makes it something that's easy to do because I'm committed to doing it once a week. So always at a set time, always with another activity. And so it makes it really easy to stick to that.

A couple of years ago when I was in an earlier stage in my business, I was participating in a pitch competition. And one of the things that they required for this was milestones. And I was kind of like, "Oh my gosh, what did I even do in the past few years?" But then I remembered that past me was smart, and she started writing down successes. So I was able to go back and look through my past planners and jot down all the milestones. And not only was that something that helps me during the pitch, but I felt like such a rockstar that at that point it was okay that I didn't win the pitch money because I was like, "Girl, look what she did in the past year and a half. You're fine."

Leah: Yes, I love that.

Samantha: So sometimes how I celebrate is I gift myself time. And so I'll look back on what I did for the week. And I'll say, "You got a lot done. You're done for the day." You know, that's one of the benefits of being self-employed and I'll say, "Go do whatever you want. Like maybe it's three o'clock on a Friday, but that's why you're self-employed. If you're going to take the bad, you're going to take the good and the good is earned time." And so, yeah, I guess how I gift time is I let myself do whatever I want.

Leah: I love it. I am a, I don't know, a basic girl sometimes. I will do a massage. I'll get my nails done. I sometimes go golfing. That's really fun these days, or I'm like, I'm going to go have happy hour with a girlfriend or see if my husband can take off early. We'll do that sometimes. It's like, we'll plan. Like, okay if we both have a good week,

then at three o'clock, we're going to go and just hang out the two of us and have cocktails. Cause I actually enjoy my husband. You know, we have fun together.

Samantha: That's one of the good things about self-employment is you do have more control over your time. And at the end of the day, your time is more valuable than money. And one of the things that helped me to realize that was being in a position where I was shifted to an hourly employee, and I started to see what someone else valued an hour of my life at. And I realized, "Oh no, I value an hour of my life a lot more than that." And so that sort of helps me to get into this head space of valuing my time and rewarding myself with time and being respectful of my time and realizing that you can always make more money, but you can never make more time. And so that has been really important for me. My husband's a fireman, so he will work 24-hour shifts, and he doesn't work Monday through Friday. So gifting time to me and to us, like you, I also like my husband and I like to spend time with him. So sometimes I will plan so that I can get the work done when he's at the sanction so that I can be more available to him when he's home. And it's just really helped me, but I think I'm more productive that way. One of my big soapboxes is when we are happy and balanced, we are more productive.

Leah: Yes. Yes. I love that this concept of goal setting and time-blocking blocking and really working and understanding what you're doing week to week. It's about allowing you to enjoy each part of your life and showing up as your best self when you're at work, when you're with your family, and giving that to them. So as we're looking at the end of the year to the next year, like, I just want to give you a few minutes to just kind of talk to that woman that's maybe had a hard year and really looking at this time in her life and in her career. And in this time of year to say, let's stop and reset and how can I move forward in the best way possible.

Samantha: So here's the thing, I'm just going to go free stream of consciousness. We are creatures who are made to live off of energy. So when we expend energy, we need to recharge it again. And I think when we don't do that, we suffer the consequences, and that is not only in our careers, but in our lives. And the harsh reality that I came to in my experience is that we only have a limited amount of time and we don't know how much we have. And so I read a quote by Annie Dillard around this epiphanal moment. And it said "How we spend each day is in fact how we are spending our lives," and that floored me. And that's the reality of it. For a lot of us, 2020 has kind of flown by oddly because it's been such a weird year, but I used to wish my days away, I used to want to, like, if I can only get till Friday, things will slow down in October. And in hindsight now, I'm sad that we're at the end of the year, because that means another grain of sand through the hourglass, you know, like, or

it's dwindling down. And so that was what was so powerful for me in this decision to reshape time and to empower people to do the same in their lives is to value our most finite resource, which is time. And then if you have a goal, value it, and don't put it off. You know, I would have all these goals that I would just never do because I let someone else's important thing get in front of mine, or for whatever reason, I wouldn't prioritize the things that mattered to me in life. And I just think it's so easy for us to do that because life supports that, but the reality is we have much more control over our days and we realize, and we are the pace setters of our lives, and we can choose to shape our day to accommodate all the things that are important to us. So I guess what I would want to leave people with is anything is possible, it's just a matter of how you get there. Your time is your most valuable and finite resource. And no one's time is more important than yours, and how you're spending each day is how you're spending your life. So feel free, in fact, I encourage you to take the necessary changes to make each day what you want it to be, and it will help you in every aspect, not just reaching goals.

Leah: Oh, I love that. And I love you. So let's talk about new year's resolutions and how you help people set good goals on the new year or around the new year that they're actually able to implement throughout the year. So I know that you have Origami Day, and this is a great tool. So tell us a little bit about how you help people do that through Origami Day.

Samantha: So what I really love for people to do is set goals and incorporate them into their daily lives year round. However, I've done a lot of research and I know that moments matter. And that's one of the reasons people love to start a new year with new goals. And so there's a lot of groundswell around these, questions of what do we need to do. Unfortunately, most people fail or abandon their new year's resolutions February. So for people to avoid that, to help people sort of staying motivated, what I would really bridge is sort of what we've talked about. Decide your why. What is your vision and why is it important to you? And that is going to be your driving beacon when things get rocky. Then with that, break it down and say, what are all of the tasks that have to happen for me to get to that vision for, me to see that become a reality, then pull maybe just one of those and turn it into a SMART goal. Give it a timeline. I usually encourage people, don't put your timeline too far away, so no more than a quarter away. So maybe it's a month from now, or maybe it's a quarter from now, but I reset goals every quarter, because if we put a six month goal or a one-year goal, that's way too much time to procrastinate.

Leah: That's a great point. Okay. So realistic and shorter timeframe.

Samantha: Shorter timeframe, and then know exactly what it is you're measuring and then write that down. And so let's just say a month from now, I want to do X thing. Make sure it's something that's realistic to do in a month and then say, "Okay, real talk. If I want that to happen in a month, what do I need to do every week to get closer to that," and then go to your calendar for tomorrow and write down that first thing, because then you kind of lose that ability to procrastinate.

Leah: I love that. Because it's already there.

Samantha: Yes.

Leah: Perfect. So I've got two more questions for you. So we have covered so much, we've got goal setting. We've got time blocking. We've got how to actually achieve your new year's resolution. And it's called setting a one to three month goal and then adjusting as you go. So you have that big vision, but like how you actually break it down with a SMART goal. I love it. So the last question I'm going to ask you, I'm going to give you a minute to think about it is how do you define success for yourself today? So while you're thinking on that, go ahead and share with us where, the listener can find you on the socials and the webs, all the webs, all the social.

Samantha: Okay. I've made it all really easy actually. So you can find me on any social media channel at myorigamiday or at origamiday.com. So that will get you to me. As far as how I define success, I love this question because I actually have spent a lot of time thinking about this, because, well, I guess I started an existential crisis six years ago and maybe I've never left it. So I often think about, "Why am I here? What am I doing? What does success mean to me?" And right now, what success is to me is being that person who can show up and support and provide. Like I've always had those friends, maybe I'm very lucky who come over to my house for dinner and they bring fresh flowers and a bottle of wine. And to me, that's success, to be able to be that friend. Because historically I've had times where I've stressed about money. Can I afford to bring the fresh flowers and the wine? Oh, I don't know, I'll just get the cheap bottle. Like success to me is being able to be that friend who can do those things, or someone's had a baby, bring them dinner or someone needs help moving show up and do it. I guess, success to me is be able to have the resources to be there for other people, whether it's time, money, or something else.

Leah: I am so in love with that answer, because I think that I share that, but never articulated it in that way. I think it's so beautiful that when we think about the word success, I have had people kind of give me pushback of like, "Oh, success, isn't the most important thing." And I'm like, "If you're giving me that you don't actually know me," because it's about defining success for yourself. Tony Robbins always says

“Success without fulfillment is the ultimate failure.” And I love that you have actually tied such a beautiful reason to become financially successful, because you want to be able to provide for other people in a way that is beautiful, right? Like flowers and a nice bottle of wine can seem frivolous to some people, but others, it can make their day. I love, and I get so inspired by women like you, that when you define or explain success, it's not something that you haven't reached. It's something that you live in.

And I think to the woman listening, I want you to think about how you define success. Tag me, give us a review on Instagram or on the socials, or just shoot me an email. I'd love to learn how people have started redefining what success means to them. And like you said, you've been, you've been thinking about that for six years and it's okay to change. Like we go through different seasons, you know, you think about, you know, when you became a mom and when you change jobs, I mean, like things happen. And just like you said, you change or adjust your goals every month to quarter. I think that we can do the same thing in how we define success and what that looks like for us today.

I'm sure a lot of people define success today differently than they did six to eight months ago. You know what I mean? Like realistically we all have different things so.

Samantha: For sure. Thank you.

Leah: I just appreciate you spending your time with us today. And I know that I'm excited to work with you. Samantha does offer products, she has books, planners. I think you even have pencils. Those were cute. I saw those on your Insta. Very cute. But she also offers consulting services and it's, I mean, she works with people all over the U.S., so I encourage you to check out Origami Day and see what she does and see if she might be a fit for you or for your company. So that would be my ask is just check her out. And I hope that you learned a little bit and you feel more inspired and empowered to set and reach your own goals for 2021.

Thanks for tuning in! I wanted to let you know that we will not be releasing an episode next week, as our team will be taking time to celebrate the holidays with our families. Our next episode will be an exciting one though, because on December 31st, we're releasing a Her Story of Success year in review episode. We even got some of our listeners to contribute, so you won't want to miss that conversation! Until then, I hope you have a safe and happy holiday season!

At Her Story of Success, we are on a mission to help women-business owners, leaders and professionals build your tribe and reach your next level of success by connecting you to one another, equipping you with resources and empowering you

along your journey. We would love for you to be a part of our tribe and further this mission by sharing this podcast with a friend or co-worker you want to help succeed. And you can stay up to date with all of our episodes, blogs and events by signing up for our newsletter at Herstoryofsuccess.com.

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