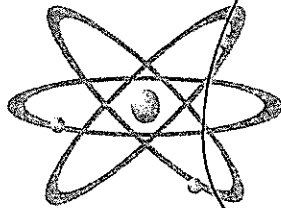
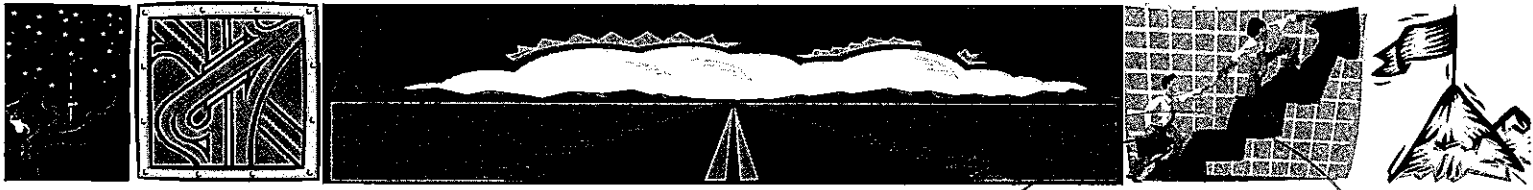


My Life Planning Workbook



JaiperJAM

WORKED
EXAMPLE

Workbook Activities

Introduction

Activity 1.1...

So now's a good time to ask the question – what type of goal setter are you? (tick the box that best applies to you):

- I'm an underachiever. I have lots of ambitions but haven't achieved any (or many) of them yet.
- I'm an underachiever by comparison with my work colleagues/ friends and want to prove to myself that I can do it too!
- I'm achieving, but would like to achieve more.
- I just want to be the best I can be!
- Seasoned goal setter looking for new ways to look at goal setting.
- Repeat 'New Years Resolution' set-and-forget offender
- something else?

It doesn't matter what type of goal setter you are, the process used in this workbook is for everyone - from stay-at-home mums to corporate executives - because the principles of goal setting are the same, its just the personal goals that are different (and personal).

Activity 1.2...

I want you to think about your life and where you are in your life at the moment. Why do you need to set goals for yourself? (complete the following sentence):

I need to set goals for myself because I need to be able to look back on my life when I retire and know I did the best I could /not regret any choices I made.

Activity 1.3...

You know yourself better than anyone else, and its important for you to know where you might let your self down in this process. So, are there any reasons why you may not follow the goal setting process through? (Tick any of the following that apply to you).

- I can't think of a good reason to set goals.
- I don't see how goal setting will help me.
- I haven't got time to do this!
- This is too hard for me.
- I'm afraid that I won't achieve my goals.
- I'm really not that serious about it.

Now for every trap you think you are likely to fall into, add it to your key message list. In **BIG LETTERS** write the opposite of the trap – for example, write "I am not afraid of failing" or "This is not too hard for me". Make sure you read this every day with conviction – the power of positive thinking is amazing, so help it keep you out of these traps.

Activity 1.4...

I want you to think about your life again. Have you had ambitions in the past that you haven't achieved? Have you tried and failed at goal setting before? After reading the above reasons for goal setting failure, complete the following sentences:

I haven't achieved my goals, because..... I always seem to find an excuse not to continue or even start, probably because I'm afraid of giving something ago and not succeeding. Also, I've never put it in writing or had a plan.

I have achieved some of my goals because..... other people have helped me keep focus.



THIS IS TYPICAL OF "DOVES" OR
"PEACOCKS" [READ 2.2 OF THE WORKBOOK]

Again, for every 'deadly sin' you think you are likely to commit, add it to your key message list. In BIG LETTERS write the opposite of the sin – for example, write "I will follow my goals through" or "I will take action on my plan". Make sure you read this every day with conviction – the power of positive thinking is amazing, so help it keep you out of these traps.

A blank "KEY MESSAGES" list is provided on the next page - take it out of this booklet and put it in a prominent location. Don't forget to add to it as you work through the rest of the workbook.

Notes:

TO ME, THE RESPONSES ON THIS PAGE INDICATE A "DOVE"
BEHAVIOUR PROFILE - AFRAID TO GET OUT OF COMFORT ZONE
AND ACHIEVING SUCCESS THROUGH INVOLVEMENT OF OTHERS.

KEY MESSAGES

People who succeed have goals, and people who have goals succeed. FROM 1.1

I am not afraid of failure - it's just another chance to improve myself! FROM ACTIVITY 1.3

I will put my goals in writing and prepare action plans. }

FROM ACTIVITY 1.4 AND 2.1

Get out of my comfort zone

Get support from friends & colleagues. FROM ACTIVITY 7.1

THESE STATEMENTS WOULD BE BETTER STARTING WITH " I WILL..... " TO MAKE THEM ACTION STATEMENTS.

It's All About You!

Activity 2.1...

Based on the above sections, complete the following sentences:

I am mostly a ~~Dove/Owl/Peacock/Eagle~~ (Cross out profiles that don't apply to you) with some traits of ~~Dove/Owl/Peacock/Eagle~~ (Cross out profiles that don't apply to you). I have **no** characteristics of ~~Dove/Owl/Peacock/Eagle~~ (Cross out profiles that don't apply to you).

My behaviours that will affect my goal setting are:

Dove: I avoid risks.

Peacock: I lose interest if it's too hard.

Owl: I want things to be perfect before taking action

Go back to the activities from Chapter 1 and review your responses. Can any of these 'behaviours' be explained by your behaviour profile?

Fear of failure: - Dove/Owl.

SEE MY COMMENTS ON ACTUAL DOPE TEST. I

Lack of planning: - Peacock

THINK SHE IS REALLY DOVE/OWL, NO PEACOCK.

To get the best out of the goal setting process I therefore need to (based on my profile):

- stop being afraid of failure
- not get bogged down in detail
- get out of my comfort zone

SEE THE THEMES STARTING TO REPEAT?

From your answer to the second of these questions, what is the one [or two] most important thing you have learnt about yourself that you need to remember throughout your goal setting journey? Add this to your key message list in **BIG LETTERS**. Make sure you read this every day with conviction – the power of positive thinking is amazing, and is your key to success.

Activity 2.2...

Is your intelligence profile what you expected? Does it match your behaviour profile? Are there any surprises?

Spatial - logical - intrapersonal → matches Owl & Dove

Expected more 'Verbal' ← WHICH WOULD BE HIGHER IF SHE REALLY WAS A

What are your intelligence preferences? Do your goals/dreams fit into these preferences? PEACOCK.

Spatial / logical → suits my career aspirations (Engineer)

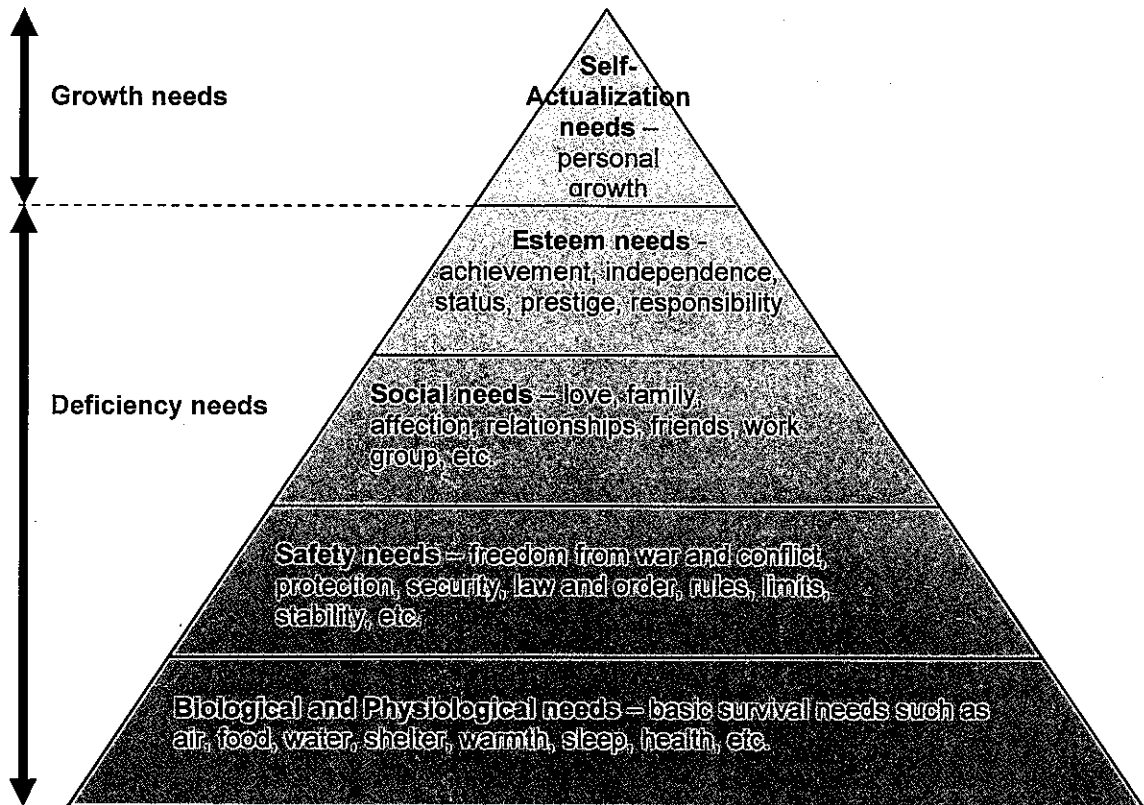
↑ TYPICAL COMBINATION FOR AN ENGINEER - SHE'S GOT A GOOD CAREER

What intelligence profiles are you lacking? How will this affect your goal-setting journey? FIT WITH

Verbal } may need these as an Engineer. Career goals? HER PROFILE.
Interpersonal }

Activity 2.3...

Think about you, and your life as it is at the moment. I'm sure you'll relate to the 5 motivational needs developed by Maslow and obviously will have a need to maintain the 'lower' level needs, even if you are mostly at Level 4 or 5.



Ignoring the need to maintain these lower levels, which level do you think you are mostly focused on?

Esteem needs - I want a big house & a BMW!

↑ USUAL LEVEL FOR GOAL SETTERS.

Are there any specific needs you have in any of the other levels? What concerns/ deficiencies do you think you have in these levels?

Health - i'd like to get fit & lose weight

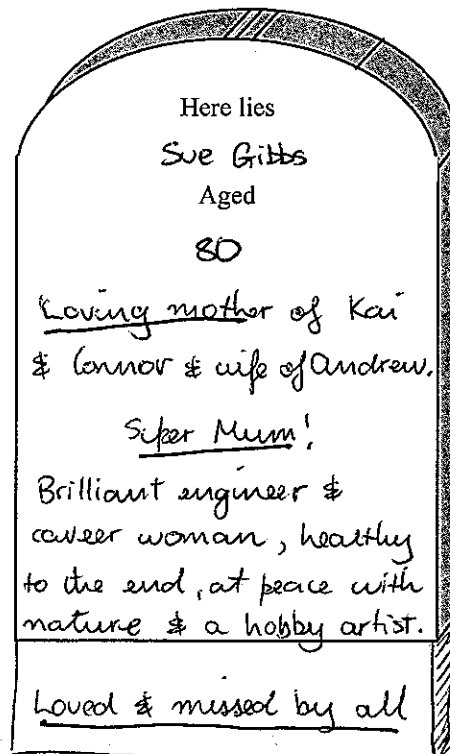
Family - need to get the kids into better routines.
- need to spend more quality time with Andrew.

THESE GET REFLECTED LATER IN HER MIND MAP.

Step 1: Get the 'Big-Picture' first

Activity 3.1...

Prepare your tomb stone inscription. If you are really feeling inspired, draft up an obituary for yourself – this will help you work out what's really important to you as it will reflect what you want to have achieved in your life.



SEE HOW HER 'DOVE'
PROFILE FEATURES
HERE!!

SUE DIDN'T DO THE OBITUARY - NOT SURPRISING DUE TO
HER LOW "VERBAL" SCORE.

Activity 3.2...

Read through the 10 different life aspects again and give them a rating from 1 (being 'extremely important' – you couldn't imagine life without this aspect!) to 5 (not important, wouldn't miss it).

- | | | |
|---|--|--|
| <input type="checkbox"/> Family | <input checked="" type="checkbox"/> Recreation | <input checked="" type="checkbox"/> Household |
| <input checked="" type="checkbox"/> Career | <input checked="" type="checkbox"/> Personal | <input checked="" type="checkbox"/> Spiritual ← TYPICAL 'OWL'! |
| <input checked="" type="checkbox"/> Finance | <input checked="" type="checkbox"/> Friendship | <input type="checkbox"/> Other..... |
| <input checked="" type="checkbox"/> Health/ Wellbeing | <input checked="" type="checkbox"/> Community | <input type="checkbox"/> Other..... |

↑ SURPRISED BY THIS ONE FOR A 'DOVE'

What is most important to you? Can you see a fit with this and the findings from the last chapter on personal motivations and your personal characteristics?

Family - Maslow need

Career - Esteem need & logical/owl tendency

Health - Maslow need

Where are your efforts currently directed? In a typical week, on average how much time do you spend on activities associated with each of the 10 life aspects? [don't forget to allow for sleep time!]

- | | | | |
|-------------|---|--|---|
| | <input checked="" type="checkbox"/> Family | <input checked="" type="checkbox"/> Recreation | <input checked="" type="checkbox"/> Household |
| THIS IS → | <input checked="" type="checkbox"/> Career | <input checked="" type="checkbox"/> Personal | <input type="checkbox"/> Spiritual |
| USUALLY | <input checked="" type="checkbox"/> Finance | <input checked="" type="checkbox"/> Friendship | <input type="checkbox"/> Other..... |
| THE BIGGIE! | <input checked="" type="checkbox"/> Health/ Wellbeing | <input checked="" type="checkbox"/> Community | <input type="checkbox"/> Other..... |

How does this compare with your ranking of what's most important? Where are the main differences?

Seems balanced to me! BUT DOES SHE REALLY DO THESE HOURS?
IT'S EASY TO UNDER/OVER STATE TIME SPENT.

Reflect on your tomb stone inscription and obituary – does this reflect what life aspects you think are most important? Are your current efforts going to help you towards this? ^{Yes} Need more emphasis on 'Personal' & 'Health'

And finally, write a 'vision' statement for your 5 most important life aspects. These are your 'big-picture' and will form the basis of your goal setting in following chapters.

- Family: A happy, healthy family full of love & success.
- Career: A rewarding & fruitful career full of challenges & responsibility.
- Personal: Fulfillment of interests and taking 'me time'
- Health: Always in good health, fit & strong and energetic.
- Finance: Having sufficient money to live comfortably & give the kids the best start they can.

A blank "BIG PICTURE" list is provided on the next page - take it out of this booklet and put it in a prominent location. You can use the Life Aspect Pie Excel spreadsheet downloadable from the TOOLBOX on the website to show life aspect preferences graphically.

SEE THE "LIFE PIE" IN THE SUPPORTING ANALYSIS

MY BIG PICTURE

1. A happy, healthy family full of love and personal success.
2. A rewarding and fruitful career full of challenges and responsibility.
3. Fulfilment of interests and having 'me' time.
4. Always in good health, fit, strong and energetic.
5. Having enough money to live comfortably and give the kids the best start possible.

THESE ARE MOSTLY PRETTY
GOOD 'BIG-PICTURE' STATEMENTS.
SEE HOW THEY AREN'T SPECIFIC,
THEY'RE JUST A STATEMENT OF
HER IDEAL LIFE IN THESE
ASPECTS

Step 2: Determine What you Really Want

Activity 4.1...

Give it a go! Draw your Mind Map now!

Make sure you incorporate the 5 life aspects you ranked as most important from the previous chapter, and for each aspect consider:

- The things you don't like about your life as it is;
- The things you like about your life;
- What you want to happen/ have;
- What you don't want to happen/ have.
- The 'gap' between your current life and your 'perfect' life.

Once you've got it all down, stand back and take a look. What's missing? What are the recurring ideas? Where are the connections between life aspects? Are there any other life aspects that are more or less apparent after this process?

Repeat this Mind Mapping process for the other 5 less-important life aspects to see if there are any thoughts and ideas that you didn't originally appreciate as being important to you.

A blank 'Mind Map' is provided on the next page - take it out of this booklet and put it in a prominent location.

Activity 4.2...

Give it a go! Do your personal SWOT analysis now! Use a separate page for each of your 5 life aspects you ranked as most important from the previous chapter – use the questions as a prompt, and write down everything you think of.

Once you've got it all down, stand back and take a look at the result. What's missing? What are the recurring ideas? Where are the connections between the life aspects? Are there any other life aspects that are more or less apparent after this process?

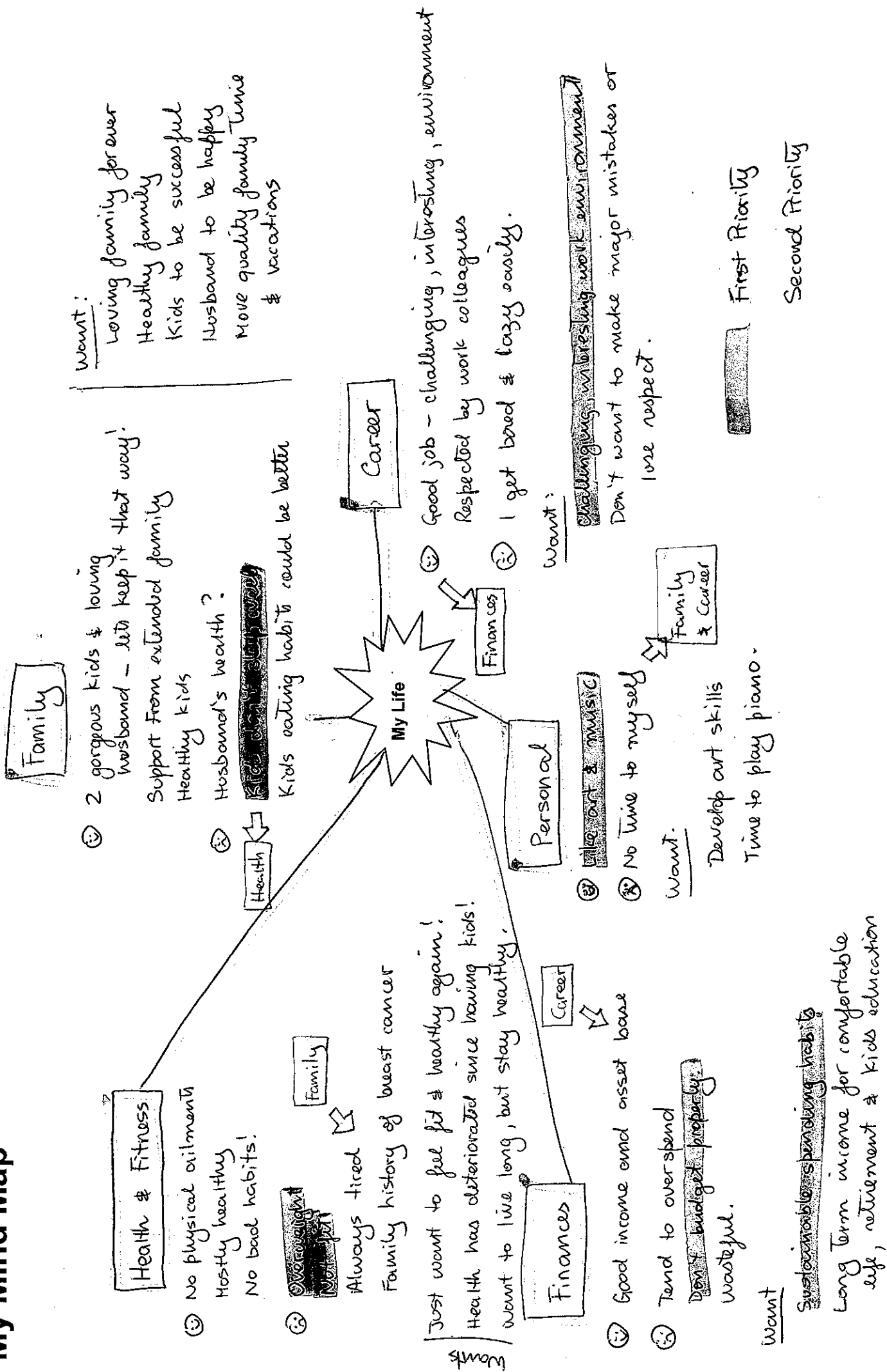
Now grab a highlighter and highlight the key items in each category. The outcome you want from the SWOT analysis for each life aspect is a short list of:

- What opportunities are best for you to pursue
- What internal strengths you can use to enhance your pursuit of these opportunities
- What threats you need to eliminate/ minimise
- What internal strengths you can use to overcome these threats
- What strengths you should consider making stronger to further enhance your ability to pursue your goals
- What weaknesses you need to improve on, or manage, so that they don't impede your goal setting.

For each life aspect, you should come up with a list of 2-3 key items for each of the above. Add these to one page, set out in the standard SWOT format, and put this sheet somewhere prominent – next to your Mind Map would be a good place. This is your current SWOT, and should be revisited from time to time as your situation changes, and forms a starting point for your goal setting.

You can download Blank SWOT pages from the TOOLBOX on the website, and you can use the blank Summary SWOT page provided at the end of this section - take this one out of this booklet and put it in a prominent location. You can repeat this SWOT analysis process for the other 5 less-important life aspects to get the full picture – just copy more blank SWOT pages.

My Mind Map



want:

- Loving family forever
- Healthy family
- Kids to be successful
- Husband to be happy
- More quality family time & vacations

First Priority

Second Priority

My Personal SWOT Analysis

Strengths:

Logical mind helps with several life aspects

Good career and career skills

No physical ailments & good health generally

Happy and healthy family

Weaknesses:

Lack of willpower in some life aspects affecting performance.

Low aptitude for sport limits exercise options.

Energy level

Available time for personal pursuits!

THIS IS JUST THE SUMMARY - SEE THE SUPPORTING ANALYSIS FOR HER DETAILED SWOT ANALYSIS. YOU'LL SEE LOTS OF RECURRING STATEMENTS & SYNERGIES WITH HER MIND MAP AND OTHER ACTIVITIES - THIS IS COMMON, AND JUST SHOWS THAT THESE TECHNIQUES ARE ALL EFFECTIVE IN GETTING TO THE BOTTOM OF THINGS.

Opportunities:

Career aspirations

By more on logical brain to overcome obstacles in some life aspects.

Improve job routines

Develop art & piano skills.

Threats:

Threats to company from economy

Failure to prioritise tasks → no time

Change in health

Change in pay.

Key statements.

↑ IN THIS EXAMPLE, SUE HAS SIMPLY HIGHLIGHTED WHAT SHE THINKS ARE THE KEY ISSUES SHE WANTS TO MANAGE FIRST.

Step 3: Establish your Goals

Activity 5.1...

From the goals/ wishes/ dreams you identified for yourself in Chapter 4, try to identify some goals that fit into the following categories:

- New skill or skill improvement:

Develop 'art' skills

Improve piano playing

- New habit or kicking a bad one:

Healthy eating & exercise

Budgeting ← ALSO A SKILL

- Outcome or dream:

Challenging career

Successful kids

Happy family

Which of these goals do you think you'll find easiest to achieve and why?

Art & piano → enjoy them the most! [but no time currently]

Budgeting → I have a logical brain to do this!

IN OTHER WORDS,
THESE GOALS MATCH
HER PERSONALITY
PROFILE & APTITUDE.

Can you identify some manageable bites you can take out of these goals as mini-goals and milestones?

Losing weight - 1 pound at a time!

Budgeting - analyse current income/outgoings

- prepare a budget

- pay off loans

- invest / save.

GOOD BREAKDOWNS.
THESE ARE "SIMPLE"
GOALS. OUTCOME
GOALS WOULD BE
EXPECTED TO HAVE
MANY MORE BITES.

Activity 5.2...

Go ahead and fully develop your goal, using the Mind Mapping process.

Make sure you consider:

- Your current position in relation to this goal
- Your proposed goal measurement system
- What you need to achieve this goal and what sacrifices you need to make
- Who makes up your support group for this goal and their roles
- What steps are needed to achieve this goal, including estimated timeframes and deadlines

Once you've got it all down, stand back and take a look. What's missing? What are the recurring ideas? Where are the connections between goal activities?

Once you're happy with the Mind Map, select one of the SMARTER Goal templates from the TOOLBOX on the website and document your goal, making sure you address all the SMARTER elements of the goal.

When you've finished, read it through – this is the crux of the goal setting process and if you don't believe what you've written, well now is the time to go back and look at why. You need to commit to what you have written on the SMARTER Goal template, so ask yourself:

- Am I really committed to undertaking the actions I have prepared?
- Am I really committed to achieving the action items within the timeframe I have set?
- Am I convinced that this is what I really want?
- Am I excited about the outcome from this goal?
- Am I prepared to allocate the resources and make the sacrifices I have identified?
- Am I actually going to do it?

If you answered "YES" to all of these questions, great! Continue to the next chapter. If you aren't sure or had some "No's" in there, then you need to go back and look at 'why' - there is no point continuing if the goal you've developed and documented has a flaw in it.

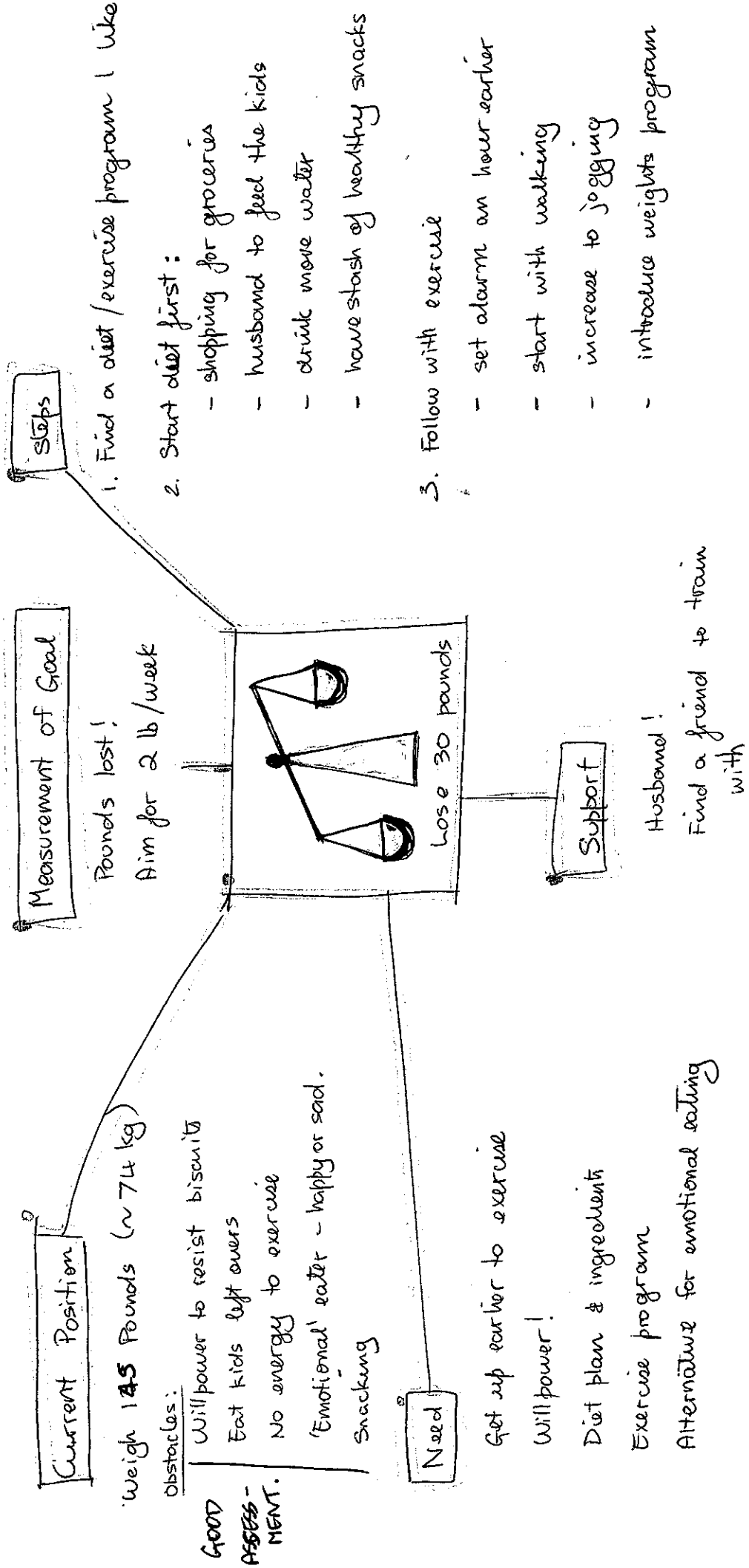
SEE EXAMPLE SMARTER GOAL,

Goal Development

My goal is to ... lose 30 pounds (~15 kg) ← GOOD SIMPLE GOAL TO START WITH - EASY TO MEASURE AND LOTS OF INFORMATION AVAILABLE ON HOW TO DO IT.

This goal is required for the ... health aspect of my life, in order for me to achieve my 'big-picture' ambition of ... always being in good health, fit, strong and energetic.

I want to achieve this goal because ... I want to be able to play ball with my kids.



GOOD ASSESSMENT.

Step 4: Prepare Your Personal Action Plan

Activity 6.1 (if required to expand Action Items)...

Take the time now to fully develop your Action Plan by expanding on the Action Items on your SMARTER Goal page, so that you have a truly actionable plan to achieve your goals. Include as much detail as necessary including the "What", "When", "Where", "Why", "How" and "Who".

When you are finished, ask yourself the question: "If these Action Items were my only set of instructions to achieve this goal, would I be able to achieve it?"

If your answer is "YES", well great! Move onto Section 6.2. If your answer is "No", go back and add to the Action Plan until you are confident that you are able to achieve your goal with the developed Action Plan.

You can download an Action Plan template from the TOOLBOX on the website.

Activity 6.2...

Prepare a Schedule for your Overall Goal

Select a scheduler that covers the duration of your goal (ie yearly, quarterly, etc). List the actions needed to achieve that goal from your SMARTER goal sheet, and draw a line on the schedule starting at the start date and finishing at the end date. Add any other activities or events coming up that may affect the schedule.

How does it look? Any clusters of activity? What level of resourcing/ effort is required during these clusters of activity? Is this achievable? Are there any non-goal activities or events likely to divert your attention from your goal?

Smooth out any spikes in activities and fill up any troughs of inactivity to give a nice steady pace and resource loading. Make any necessary changes to your Action Plan or in the relevant section of the SMARTER goal template to keep the documents consistent.

You can download a range of Schedulers from the TOOLBOX on the website.

Prepare your first set of Planners

Select a Planner/s with a timeframe that suits your goal and prepare your planners, combining your goal specific Action Plan with your day-to-day activities on the same planner. Chose a short term and medium term planner (eg daily and weekly, or weekly and monthly) and prepare up to 1 month worth of planners at a time.

This is your first set of Planners. As you progress through your goal, prepare successive sets of planners combining your goal specific Action Plan with your day-to-day activities.

You can download a range of Planners from the TOOLBOX on the website.

SEE SUPPORTING EXAMPLE SCHEDULE AND ACTION PLANNERS.

Step 5: Review Your Action Plan and Goals

Activity 7.1...

I'm sure you've already achieved some goals and failed at others, even though you may not have specifically set them as SMARTER goals.

Think about a success and a failure and try the above analysis. What are your main findings? Does this fit in with the concepts discussed in this workbook? Are there any take-away messages to add to your key message list?

Successes

'Conventional' goals

Good support from family
or work colleagues

Career goals most successful -
documented as part of review.

IE GOALS
IN WRITING!

Goals made a priority.

Failures

Out-of-comfort zone goals - ie
got scared and jumped back
into comfort zone.

Goals not shared with anyone

Often didn't even get off the
ground.

Goals not taken seriously or
given low priority.

SO GOAL SETTING WORKS FOR 'DOVES' WITH
In Closing... SUPPORT FROM OTHERS &
CORRECT PRIORITY.

TYPICAL FOR A DOVE.

Check-off that you now know:

- What exactly 'goal setting' is and why it's important to you
- Why the goal setting process often fails and why you may not have succeeded at setting or achieving goals in the past
- How your behaviour profile, natural intelligence and motivational needs will affect your goal setting
- What Life Aspects are and the ones that are most important to you
- What your 'Big-Picture' is
- What your SMARTER goals are
- What your Action Plans are so that you can achieve your SMARTER Goals and integrate them with your day-to-day activities
- Why you need to monitor and review your goals and progress and how
- How to turn 'failure' into valuable lessons for the future

