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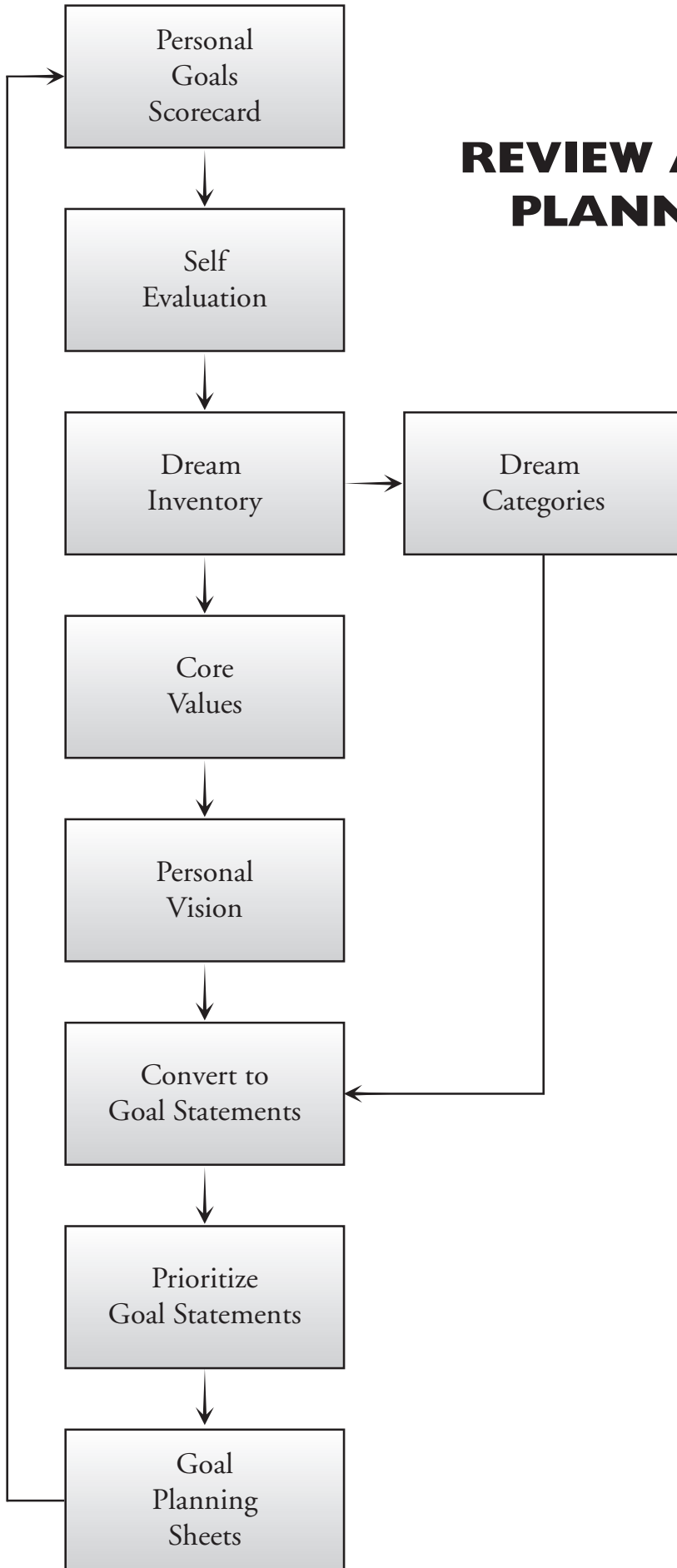
PERSONAL PLANNING PROCESS

Name

Date

Who I am was a gift to me ... who I become is a gift to others.

REVIEW AND PERSONAL PLANNING PROCESS



IDEALS

As you think, you travel.

As you love, you attract.

You are today where yesterday's thoughts have brought you.

You will be tomorrow where today's thoughts take you.

You cannot escape the results of your thoughts.

You can endure and learn.

You can accept and be glad.

*You will realize the vision, not the idle wish of your heart,
be that vision blasé or beautiful, or a mixture of both.*

For you will always gravitate toward that which you secretly love.

In your hand will be placed the exact result of your thoughts.

You will receive that which you earn, no more, no less.

Whatever your environment or circumstances may be;

you will fall, remain, or rise with your thoughts,

your wisdom, your ideals.

*You will become as small as your controlling desire,
and as great as your dominant aspirations.*

James Allen

PERSONAL GOALS SCORECARD

List your goals from last period. Enter Y if accomplished, N if not. You will enter the Annualized Dollar impact. Use this form for tracking purposes.

| FROM | TO | GOALS LAST PERIOD | ACCOM- PLISHED | | ANNUALIZED DOLLAR IMPACT |
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Now that you have evaluated your progress for the last year, you are about to undertake an introspective process that deals with your future personal growth and change. Most people never consider who they are, what they represent, what they have accomplished, what they want to accomplish, and who they want to become.

The following exercises will help you to identify some of your strengths, weaknesses, values, and dreams. As you complete this process, you will discover your personal uniqueness and your personal vision for success. You will harness the power of clarifying your personal and professional goals and realize the rewards of creating balance in your life.

A VISION OF MY FUTURE

All too often, we hear people lamenting about things they didn't do, say, or see. "If only I had it to do over again, I'd do ..." is an often heard remark at both social and business functions. Regardless of your age today, you cannot change what you did or did not do yesterday. You CAN, however, ensure that your remaining time is spent wisely; and focused on activities and endeavors that will provide you with fulfillment and satisfaction when you look back on the life you've lived.

You can begin now by projecting yourself five (or ten or more) years into the future. How old will you be in five years? What will your life be like then? How will your personal, family, and career circumstances have changed by that date? Of course, this is a highly imaginative projection, but attempt to be as realistic and objective as possible.

In completing this exercise, two questions will repeatedly come to mind:

Should I describe my future the way I want it to be? or Should I describe my future the way I really think it is going to be?

You will probably allow both factors to enter into your answers. Such a solution is both natural and desirable. This exercise is for your benefit. It is designed to help you begin thinking today about where and who you want to be tomorrow and what you ultimately want to accomplish in your life. No one other than you will see this projection unless you wish to share it.

1. In five years I will be _____ years old.

2. My occupation/business or most important activity will be: (be as specific as possible)

3. Five years from now, my principle responsibilities will be:

4. My approximate annual income (or my family's) will be: _____

5. Five years from now, my family responsibilities will be:

6. Five years from now, my social responsibilities will be:

7. Five years from now, I would feel a deep sense of satisfaction if I were to have accomplished the following:

8. Five years from now, I would like to have visited the following:

9. Five years from now, I would like to describe my life as follows:

WHO AM I?

Now that you have imagined the future, let's return to the present. The purpose of these exercises is to aid you in drawing together information about yourself and in developing a personal goals program. You will make many discoveries that will motivate and add direction to your life. Take your time and thoughtfully consider each step.

1. In what I am doing now, what is giving me:

the most enjoyment professionally?

the most enjoyment personally?

the greatest sense of accomplishment professionally?

the greatest sense of accomplishment personally?

2. In what I am doing now, what is giving me:

the least enjoyment professionally?

the least enjoyment personally?

the least sense of accomplishment professionally?

the least sense of accomplishment personally?

3. If I could change one thing:

about my professional life, it would be:

about my personal life, it would be:

about me, it would be:

4. What are my personal strengths?

5. What life areas or skills need development?

6. What do I strive for most in life?

7. In my life, I am most:

grateful for:

proud of:

8. If I were to wake up tomorrow having gained one new ability or quality, what would it be?

9. If I had no limitations placed on me, following are some things:

I would like to do:

I would like to become:

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10. For me, what would constitute a “perfect”:
evening?

day?

11. If I could take a one-month trip anywhere in the world and money was not a consideration, where would I go and what would I do?

12. Who do I admire most? _____

What qualities of that person do I admire?

What qualities of that person would I like to possess?

What qualities of that person do I possess?

13. A statue is built in my honor. What do I want listed on the plaque as the major accomplishments of my life?

14. I have the opportunity to attend my own funeral service. There will be four speakers. What would I like each speaker to say about me and my life?

Family member (immediate or extended):


One of my friends:

Co-worker:

A member of my religious or community organization:

DREAM INVENTORY


This is a page for dreaming. List here everything you've ever wanted—to go, to do, to have, to be, to become. Take off the blinders of probability and possibility. Throw out the filters of whether you need it, deserve it, or are worth it.

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DREAM CATEGORIES

This is a page for identifying and categorizing your dreams based upon a simple time parameter. Review your dream inventory, and begin to list your dreams in the appropriate time frame, based upon those that could be realized within a short time frame (one year), and those that still seem to be out there in the distant future (five years or more).

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DREAM CATEGORIES



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PERSONAL CORE VALUES WORKSHEET


You will have clarity of purpose and a sense of rightness if you take the time to clearly define and prioritize the values that govern your behavior. Your personal core values are absolute and without exception. These values will also serve as a basis for your decisions and life choices. Use the worksheet below to crystallize your personal core values, and rank them in order of their priority.

|  CORE VALUE | RANK ORDER |
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PERSONAL BEHAVIORS WORKSHEET

*Personal core values are seen and communicated to the organization through personal behaviors.
People believe more of what you do than what you say, and if there is an inconsistency,
behavior always overrules words.*

List your personal core values in rank order. Then, list the behaviors that are needed to operationalize each core value with your family, friends, business associates, and others (define appropriately).

|  | CORE VALUES | SUPPORTIVE BEHAVIOR | WITH |
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PERSONAL VISION STATEMENT WORKSHEET

Use the following space as a worksheet and develop a relatively short, easy to remember personal vision statement. Your personal vision is your opportunity to articulate and crystallize your aspirations for your future and your life. A vision is a mental picture of the *ideal*. While your vision statement articulates your *desired* future, its impact will be *immediate*. It will serve as the foundation for your day-to-day decision making. Read over this statement several times, making additional comments or changes before writing your final draft on the following page.

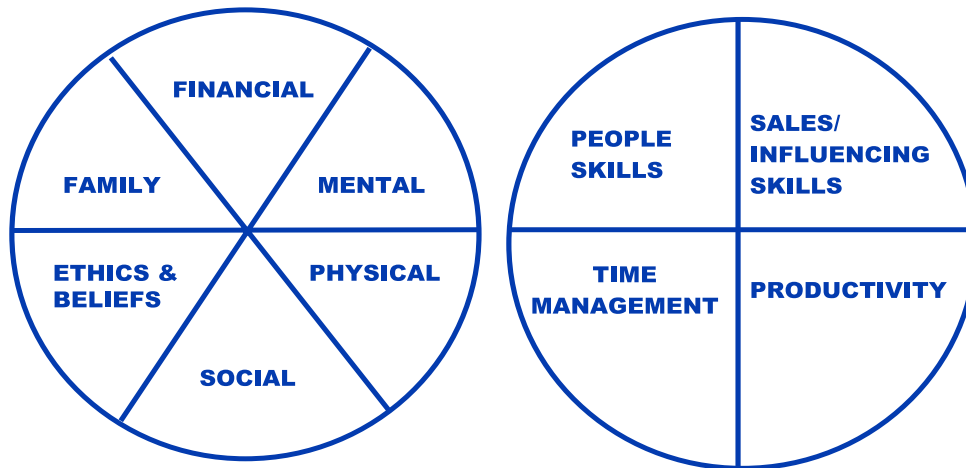
LIFE WHEELS

The key to meaningful success is balance. Too much focus on one or two life areas can lead to stress, frustration, and discontent. Success in one life area at the expense of falling short in another is not very meaningful. Only by achieving and accomplishing goals in all life areas can we live a life that leads to fulfillment and satisfaction.

Life is much like a wheel. A smooth, well-rounded wheel rolls more quickly and easily than one with dents or bumps. Developing a well-balanced direction in life begins with determining present status. Accordingly, take a moment to view your personal and organizational life wheels. Shade each area of the wheel below as it corresponds with the level of satisfaction you are presently experiencing in that area. (The center of the wheel represents 0% and the outer rim represents 100%.)



Life Wheels



Observations:

GOALS CATEGORIES

MENTAL DEVELOPMENT

Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: **W**ritten, **H**armonious, **Y**ours, **S**pecific, **M**easurable, **A**ttainable, **R**ealistically high, and **T**ime-bound. Then, assign it a priority.




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Review what you've written and check to see that it meets the WHYSMART criteria. If not, rework the statement of the goal. You are now ready to begin goal planning for mental development.

GOALS CATEGORIES

SOCIAL DEVELOPMENT

Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: **W**ritten, **H**armonious, **Y**ours, **S**pecific, **M**easurable, **A**ttainable, **R**ealistically high, and **T**ime-bound. Then, assign it a priority.




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Review what you've written and check to see that it meets the WHYSMART criteria. If not, rework the statement of the goal. You are now ready to begin goal planning for social development.

GOALS CATEGORIES

PHYSICAL DEVELOPMENT

Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: **W**ritten, **H**armonious, **Y**ours, **S**pecific, **M**easurable, **A**ttainable, **R**ealistically high, and **T**ime-bound. Then, assign it a priority.




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Review what you've written and check to see that it meets the WHYSMART criteria. If not, rework the statement of the goal. You are now ready to begin goal planning for physical development.

GOALS CATEGORIES

FINANCIAL/CAREER DEVELOPMENT

Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: **W**ritten, **H**armonious, **Y**ours, **S**pecific, **M**easurable, **A**ttainable, **R**ealistically high, and **T**ime-bound. Then, assign it a priority.




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Review what you've written and check to see that it meets the WHYSMART criteria. If not, rework the statement of the goal. You are now ready to begin goal planning for financial/career development.

GOALS CATEGORIES

FAMILY LIFE DEVELOPMENT

Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: **W**ritten, **H**armonious, **Y**ours, **S**pecific, **M**easurable, **A**ttainable, **R**ealistically high, and **T**ime-bound. Then, assign it a priority.




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GOALS CATEGORIES

ETHICS AND BELIEFS DEVELOPMENT

Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: **W**ritten, **H**armonious, **Y**ours, **S**pecific, **M**easurable, **A**ttainable, **R**ealistically high, and **T**ime-bound. Then, assign it a priority.




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GOALS CATEGORIES

PERSONAL BEHAVIORS/CORE VALUES DEVELOPMENT


Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: Written, Harmonious, Yours, Specific, Measurable, Attainable, Realistic, and Time-bound. Then, assign it a priority.

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DEVELOPMENT


Turn back to the exercises you have just completed and, if appropriate, any previous exercises that might help you identify goals or goal categories that genuinely excite you. Identify several goal categories in the space below. Next, formulate a goal and write it in the appropriate space. Remember to state your goal positively and to make it **WHYSMART**: **W**ritten, **H**armonious, **Y**ours, **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**ime-bound. Then, assign it a priority.

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|  CATEGORY | GOAL | PRIORITY |
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Review what you've written and check to see that it meets the WHYSMART criteria. If not, rework the statement of the goal. You are now ready to begin goal planning.

1 GOAL

2 REWARDS

3 CONSEQUENCES

9 TARGET DATE

TODAY'S DATE

AFFIRMATIONS

10

4 POSSIBLE OBSTACLE

5 POSSIBLE SOLUTIONS

6 NECESSARY ACTION STEPS

7 DATE

8 DELEGATED TO

4 POSSIBLE OBSTACLE

5 POSSIBLE SOLUTIONS

6 NECESSARY ACTION STEPS

7 DATE

8 DELEGATED TO

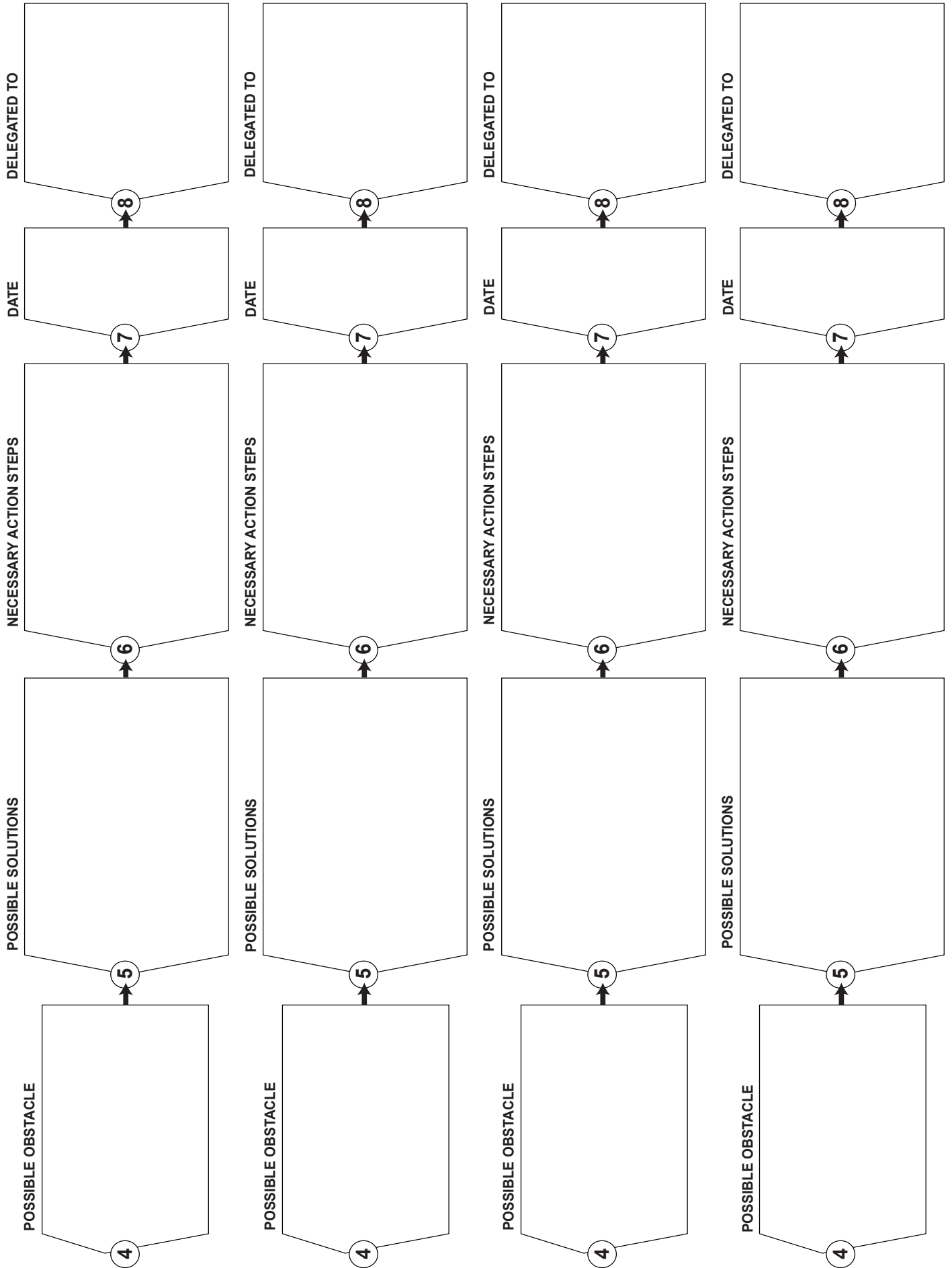
4 POSSIBLE OBSTACLE

5 POSSIBLE SOLUTIONS

6 NECESSARY ACTION STEPS

7 DATE

8 DELEGATED TO



1 GOAL

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3 CONSEQUENCES

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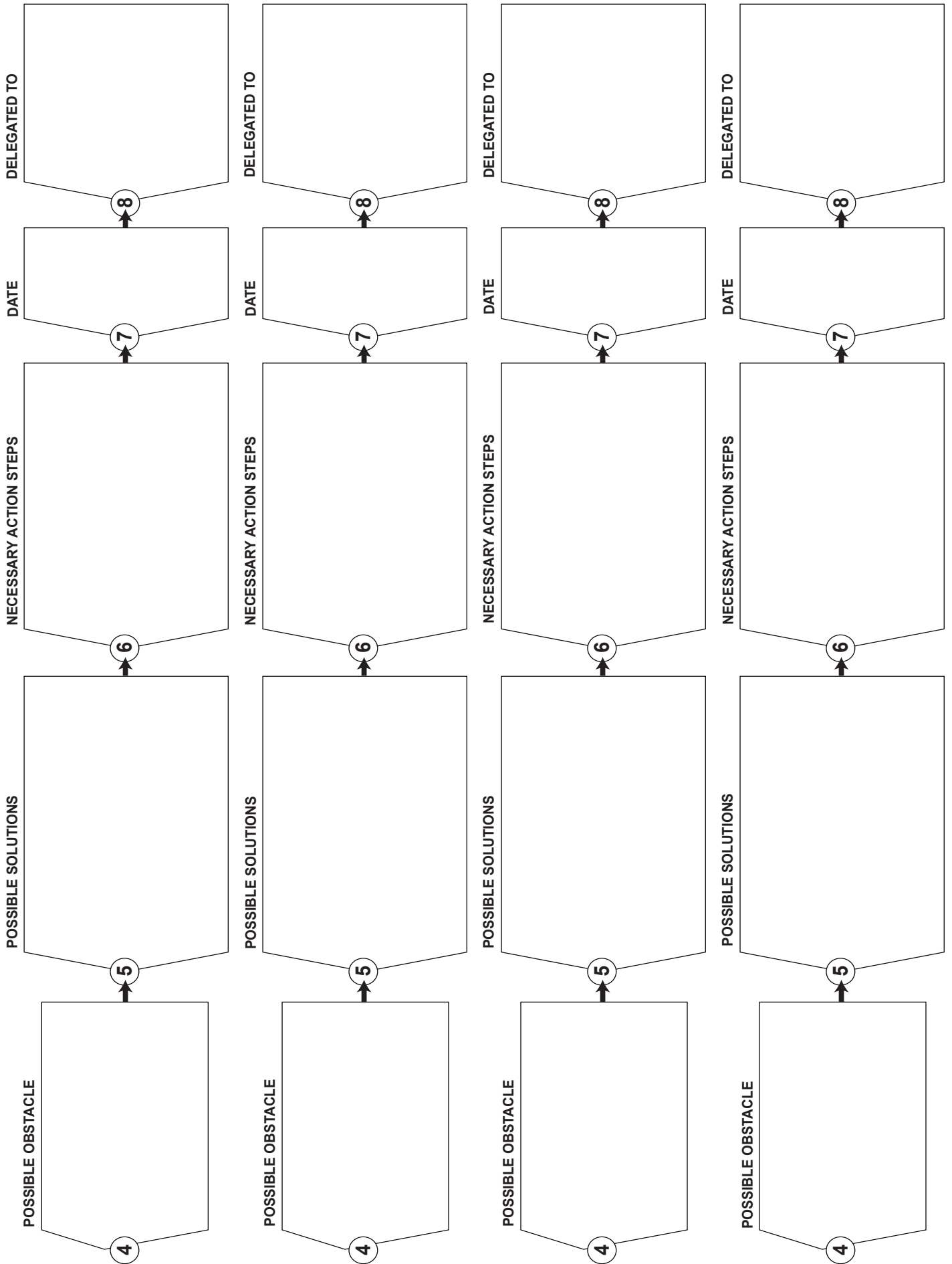
4 POSSIBLE OBSTACLE

5 POSSIBLE SOLUTIONS

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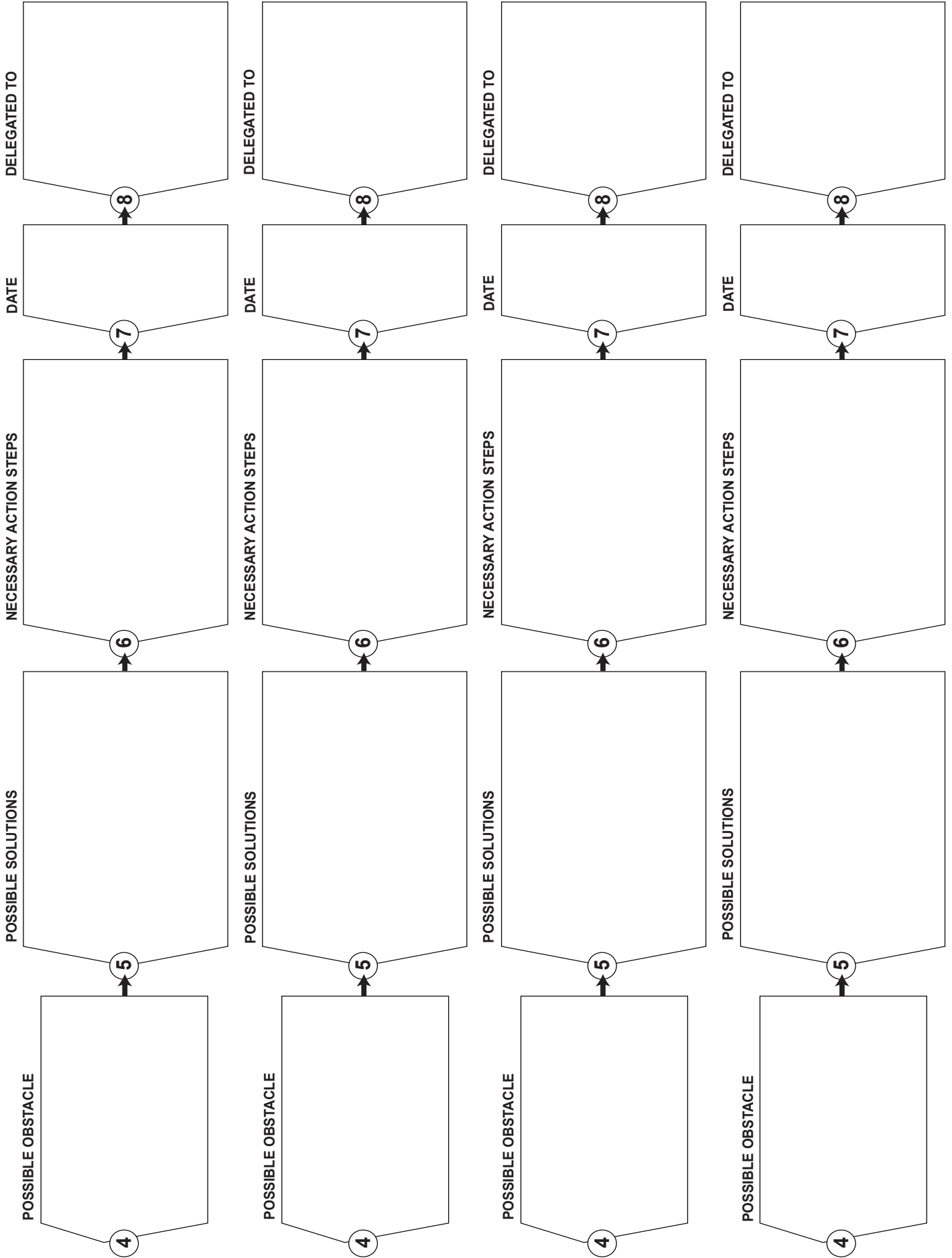
4 POSSIBLE OBSTACLE

5 POSSIBLE SOLUTIONS

6 NECESSARY ACTION STEPS

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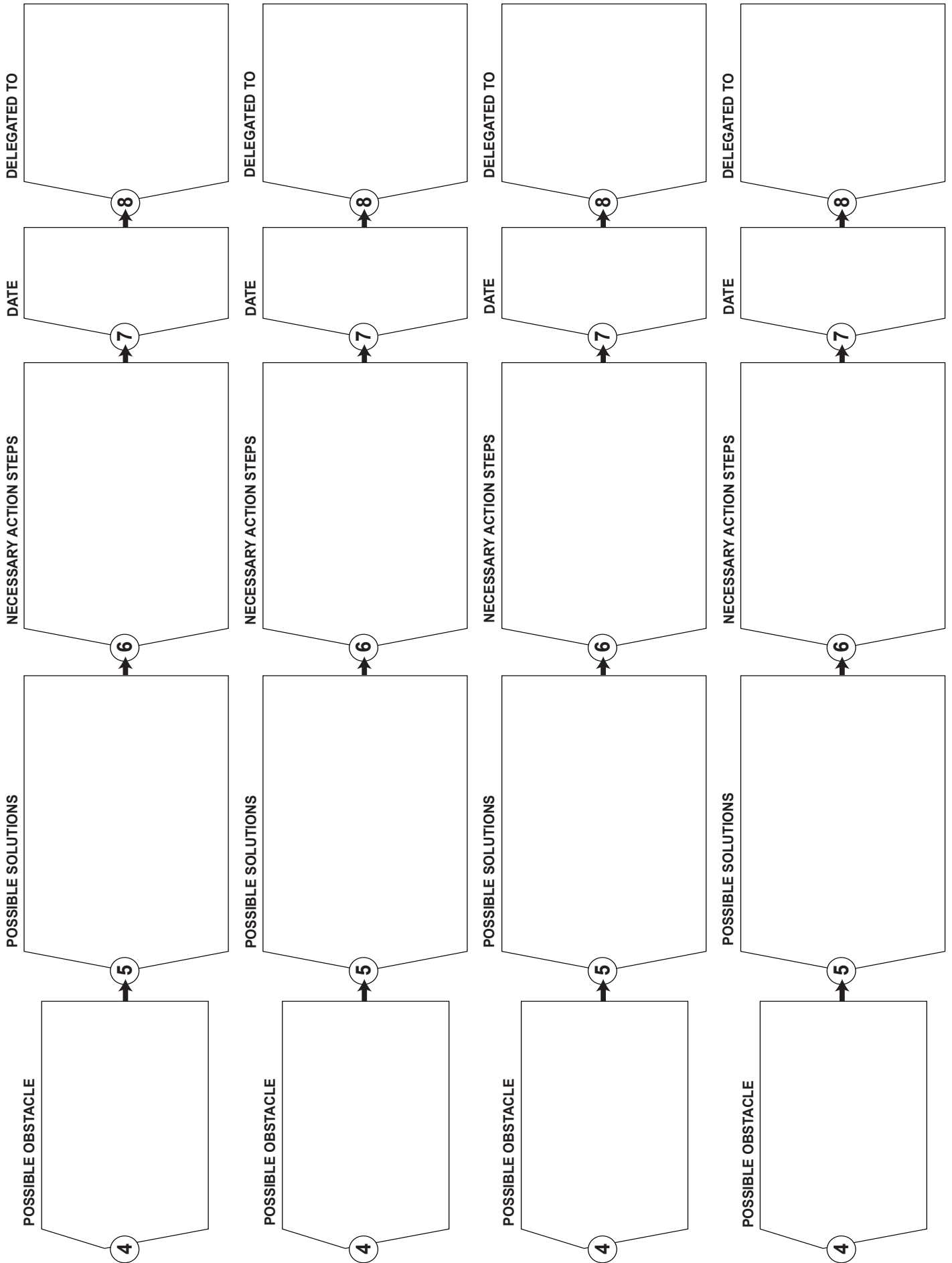
4 POSSIBLE OBSTACLE

5 POSSIBLE SOLUTIONS

6 NECESSARY ACTION STEPS

7 DATE

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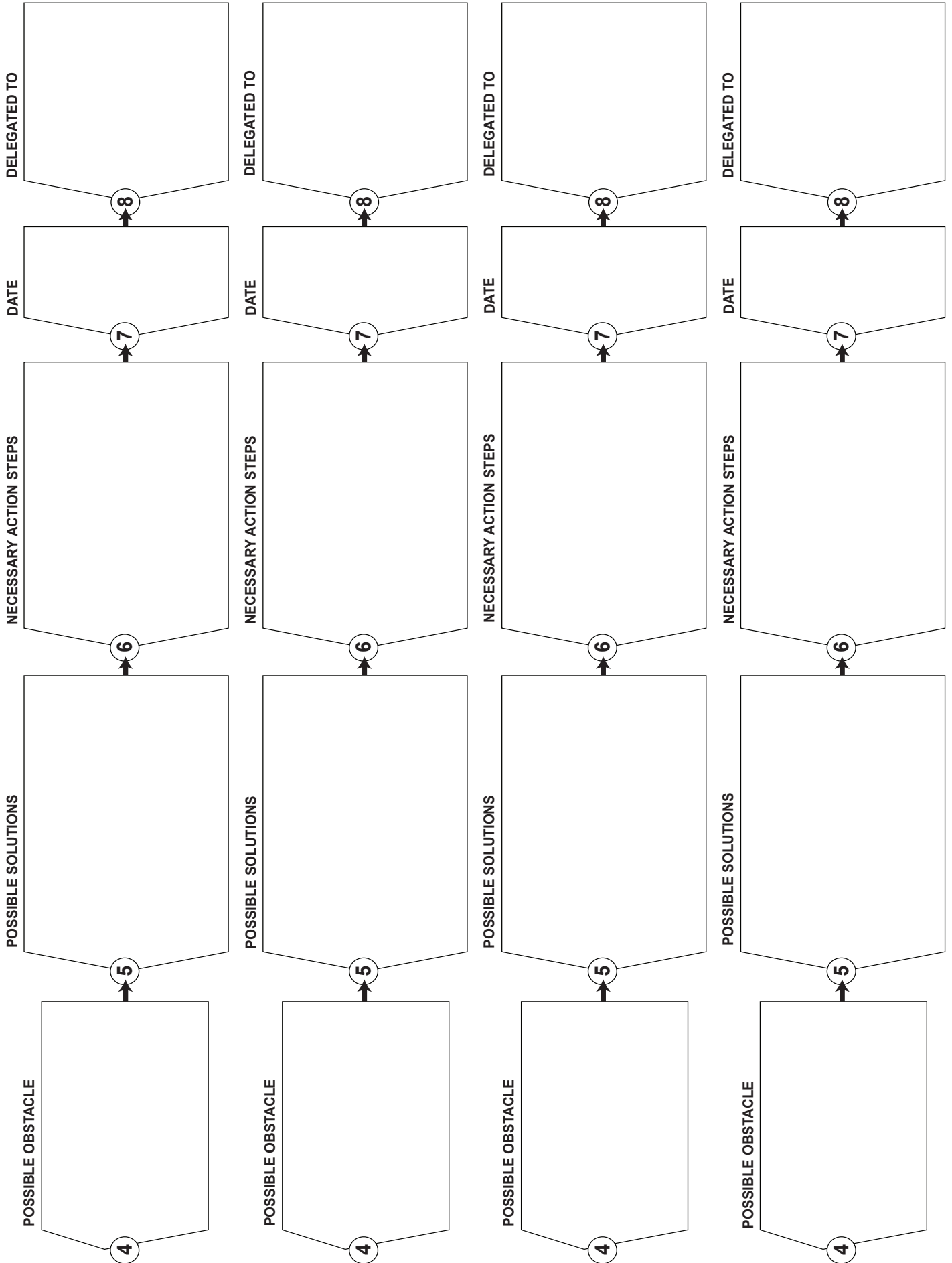
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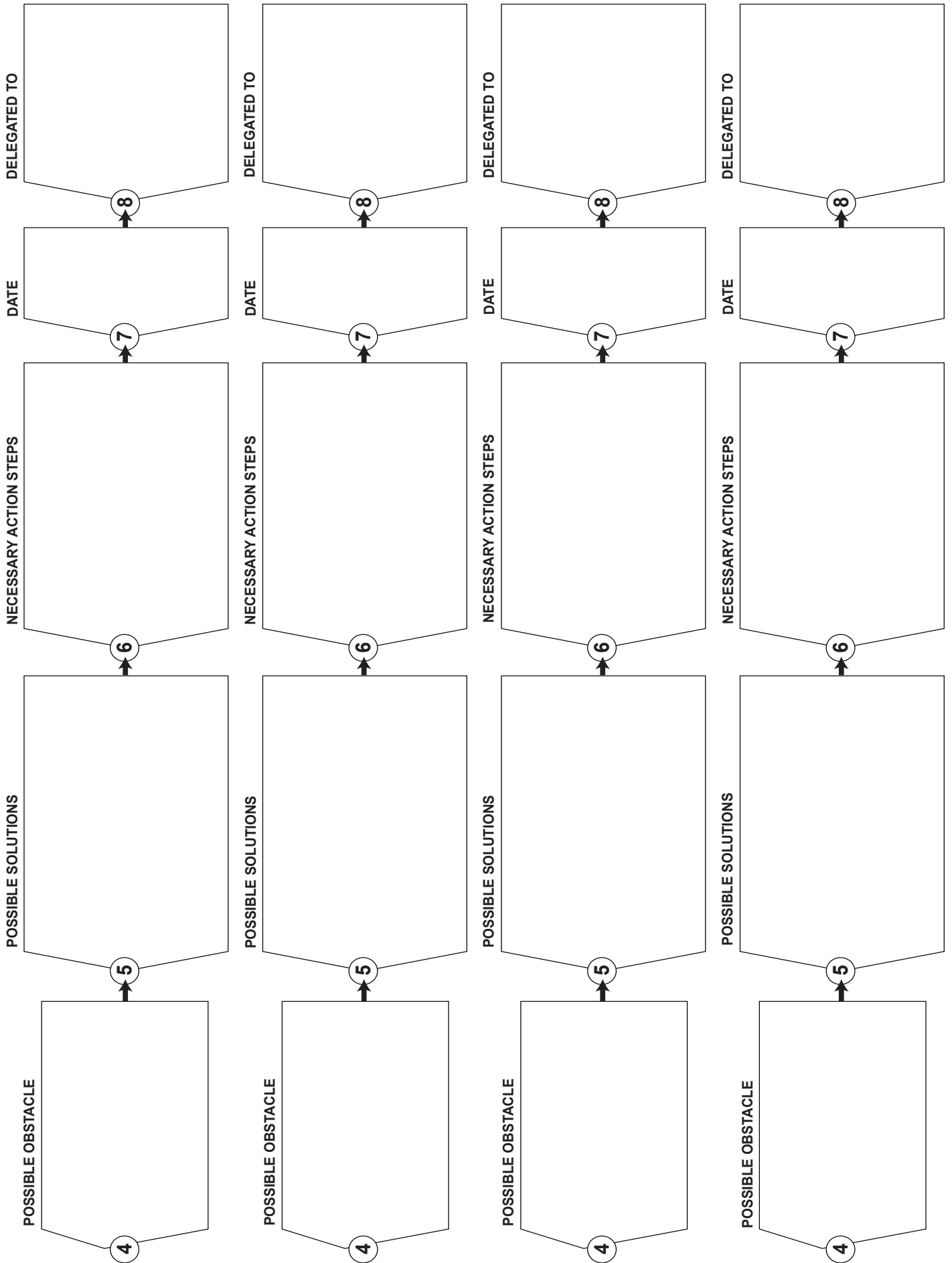
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GOALS SUMMARY

| COMMENTS | REVIEW | FUTURE GOAL IDEAS |
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GOALS SUMMARY

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GOALS SUMMARY

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GOALS SUMMARY

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