Planning the Practice
focus for professionals

Purpose Planner:
Developing Your Life Plan

There are those that would certainly disagree with my view but it seems near impossible to go through life achieving your dreams without understanding why you are on this planet. This worksheet is meant to help you discover your Why!

Some people go through life with no idea of what they want to achieve or can't articulate it. While we don't believe this worksheet will be the be-all, end-all of your life planning, we do believe it will help get you started on thinking more intentionally about your life and what you want to achieve.

This worksheet is meant to be used in conjunction with the Planning the Practice Planner & Journal but could also be used as a stand alone worksheet with your own planning system. If you are using the worksheet with our Planner/Journal, go through each of the steps filling out the information as completely as possible. Once you have completed this worksheet, you will have completed the "Planning" portion of the planner and are now ready to start executing your plan. If you're ready, start with the end in mind.

Step 1: Begin With the End in Mind
When your life is over, how do you hope you'll be remembered? What are the things you hope people will say about you? Completing your own eulogy is one of the most difficult things you may ever do. It should cause you to take pause and question just about everything in your life. It should help you uncover and create meaning. It should help you take stock of your interactions with family, friends, and colleagues. For the next moments pretend you are watching your own funeral, seeing the people who have come to remember your life, hearing what they have to say about your relationship with them (both good and bad). Now use the space below to capture your initial thoughts.

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Now that you have captured some thoughts about how people will currently remember you, think about how you want to be remembered. Use the space below to write your own eulogy.

Understanding more about your ultimate end goal will help you craft personal vision and mission statements. That is the next step.

Step 2: Craft your personal vision and mission statements.

Vision is how you see some aspect of yourself in the future. It could be your business, your family, or yourself. Mission is the thing(s) you want to achieve that support the vision of your future self.

My Vision:

My Mission:

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Your vision and mission statements will guide all your other endeavors. If you are using the Planning the Practice Planner/Journal as your total work/life system, it is now time to ask questions that will help you determine your goals for the upcoming year.
Step 3: Goal Planning
Ask: What do you need to accomplish this year to move you closer to your ideal self, vision, and mission? Try to come up with at least 10 goals.
1:
2:
3:
4:
5:
6:
7:
8:
9
10:
Before you commit to the list above ask the following questions of each one.
How will this action or habit help me realize my ideal self and fulfill my purpose?
1:
2:
3:
4:
5:
6:
7:
8:
9:
10:

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Why is this important for me?
1:
2:
3:
4:
5:
6:
7:
8:
9:
10:
How will I know I have achieved this goal?
1:
2:
3:
4:
5:
6:
7:
8:
9:
10:
Is this something I can achieve this year or quarter?
1:
2:
3:
4:
5:

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6:
7:
8:
9:
10:
The above questions should help you develop your goals in to SMART (Specific, Measurable, Attainable, Relevant, and Time-Based). Once you have developed about 10 SMART goals for the upcoming year, you are ready to complete the planning section of your Planner/Journal. Transfer your Vision and Mission statements to the Planner/Journal. Transfer your SMART goals. Then use the goal detail pages to help further clarify your goals for the upcoming year.
Congratulations! Once your planning is complete, you're ready to start executing your plan. Executing your plan will require you to make and consistently practice new choices. Use the RAP method to Review your daily, weekly, and monthly choices. Your choices are observable in your calendar events, projects, books you read, gratitude, and tasks. Assess how consistently you are able to execute toward your goals. Then Process using the review and journal pages. Focus on what needs to remain consistent, what needs to change, i.e., new choices, thoughts, behaviors, as you continue to work your plan.

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