

Life Plan Workbook 2012

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Mind Tools' Life Plan Workbook 2012

Introduced by Mind Tools CEO, James Manktelow



Dreams – we all have them! Things we'd love to do, places we want to go, people we want to meet, things we really want to experience.

Unfortunately, for many people, these dreams stay unfulfilled.

Sometimes, this is because life circumstances make it impossible for people to achieve their dreams. More often, people simply don't organize themselves to turn their dreams into reality – and then "wake up" to find that life has passed them by.

With this workbook, you can make sure that this doesn't happen to you!

This workbook brings together more than 14 years of Mind Tools' experience in helping clients with goal-setting training programs and software.

It gives you a comprehensive and practical life-design and goal-setting framework, and includes tools that I use every day to set and achieve my own goals. That's how I know that this workbook gives you everything you need to set out on your own path to success and fulfillment!

The workbook starts by helping you look into yourself, so you know what it is that you want from your life. It helps you think about your dreams and narrow them down to the most important ones – after all, if you spread your efforts too thinly, you'll achieve little of any substance.

The workbook then shows you how to set the goals that will power you to achieve your dreams.

And, finally, it teaches you how to organize yourself to make working towards achievement an everyday part of your life.

Enjoy using the 2012 edition of this popular workbook!

A handwritten signature in dark ink that reads "James Manktelow".

James Manktelow
CEO
MindTools.com

Mind Tools -
Essential skills for an excellent career!

Contents

Introduction.....	5
1. Exploring You	6
1.1 Understanding Yourself at Your Best	6
1.2 Exploring Your Values.....	12
1.3 Understanding Your Needs	15
1.4 Drawing This Together	16
2. Explore Your Dreams!	19
3. The Choices That Define Your Life	25
3.1 Narrowing Down Your Dreams.....	25
3.2 Writing Your A-List	31
3.3 Checking Your Dream List	31
4. Creating Powerful Goals	33
4.1 Why Set Goals?	33
4.2 Setting Powerful Goals.....	33
4.3 Setting Your Goals.....	34
4.4 Identifying “Milestones” and First Steps.....	37
5. Organizing for Success	41
5.1 Using a Simple Action Program	41
Moving On... ..	44

Introduction

Welcome to the **Life Plan Workbook**!

It's often said that people spend more time planning their next vacation than they do planning their life and career.

This is a real tragedy – it results in people reaching a certain age, reflecting on where they are, and wondering why their life seems so unsatisfying. And it also results in people reaching retirement and thinking, sadly, about the things they would have liked to have done, and the opportunities they've missed.

The great news is that this needn't be you, and it's never too late to start planning!

"A goal without a plan is just a wish."

Antoine de Saint-Exupery, French writer

With a little forethought and preparation, you can map out an exciting future. And then – with hard work, application, and a little good luck – you can live a life that is rich, full, stimulating, and worthwhile.

The next piece of good news is that the framework you need to do this planning is now in front of you.

All you need to do is print this document off (if you haven't already) and take a few hours – no more than you'd take to plan that vacation – to work through it.

We start by "Exploring You." We look at your values, and the things that give you a sense of meaning in life. We explore the activities that you find satisfying, and the situations in which you've been really happy. And we weigh up your needs, and think about how these needs may develop in the future.

Next, and drawing on your self-knowledge, we "Explore Your Dreams." Here we brainstorm everything that you might want to do, be, or have,

in all areas of your life – even in your wildest dreams.

But if you try to achieve all of your dreams, you'll likely achieve none of them. So, in "Make the Right Choices," we'll narrow these many dreams down to a core list that you really want to achieve.

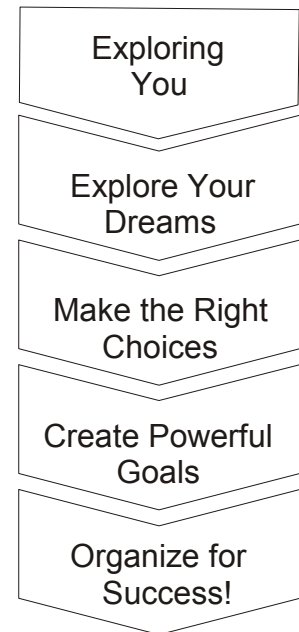
These dreams will be the very most important ones to you, and if you make them happen, you can always come back for more!

Next, in "Create Powerful Goals," we turn these dreams into rich, inspiring visions of the future, and we set strong goals that will motivate you to achieve this future.

Finally, in "Organizing for Success," you'll start planning how to achieve these goals, and you'll learn how to make their achievement an everyday part of your life.

You'll be amazed by how much sharper your focus will become once you've completed these exercises. What's more, you'll have already started working towards a happy, fulfilling, and satisfying life!

It will take only about four hours to do all of this. So let's get to work!



"The future belongs to those who believe in the beauty of their dreams."

Eleanor Roosevelt, American first lady

1. Exploring You

Your first step is to explore yourself – this is essential if you want to live your life in a way that is wholly consistent with who you are, and who you want to become.

It's not always easy to identify the things that are most important to you, or the things that make you happiest and most fulfilled. However, it's worth making the effort to do this, so that you can choose a life that will bring lasting happiness.

This gives you a starting point for brainstorming the paths you could take. It also gives you something you can check against as you choose between your dreams, to ensure that these really will bring the happiness you want.

Firstly, you need to understand what makes you feel happy, and what gives you a sense of meaning.

We'll start by looking at the times when you've been at your happiest; at the times when you've been proudest of the things that you've done; and, at the times when life has had the most meaning for you.

We'll move on to look at your values, so that you can choose paths that are consistent and are properly aligned with the values that you consider to be important.

And, finally in this section, we'll look at your needs, so that you can identify any areas where your needs are not being met.

In all, this section will take a little over an hour to complete. Enjoy this – you'll know a lot more about yourself once you've completed it!

1.1 Understanding Yourself at Your Best

First, we'll look at what makes you feel happy, what fills you with pride, and what gives you the greatest sense of meaning.

We'll start by exploring the situations in which you've felt these things, and then identify what elements contributed to making them so good.

1.1.1 What Makes You Happy?

On the following pages, identify up to five situations, in different parts of your life and your career, in which you've been particularly happy.

"Happiness is when what you think, what you say, and what you do, are in harmony."

*Mohandas Gandhi,
Indian leader*

For each situation, identify the factors that contributed to making the situation so good.

Exploring You

Explore Your Dreams

Make the Right Choices

Create Powerful Goals

Organize for Success!

Happiness Situation:

Factors Contributing:

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Happiness Situation:

Factors Contributing:

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Happiness Situation:

Factors Contributing:

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Happiness Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Happiness Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Now look through the factors you've identified in these situations, and identify the five factors that are most important to you. Write these down on the "Things That Make Me Happy" table on page 17.

You can find out more about the factors that need to be in place for you to be happy, in our article on the [PERMA Model](#).

1.1.2 What Makes You Proud?

We'll now repeat this by looking at situations in which you've felt particularly proud of something that you've done.

Again, identify up to five situations (including in your career), and write down the factors that contributed to your feeling of pride.

Pride Situation:

Factors Contributing:

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Pride Situation:

Factors Contributing:

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Pride Situation:

Factors Contributing:

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Pride Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Pride Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Now look through the factors you've identified in these situations, and identify the five factors that are most important to you.

Again, identify up to five situations (including in your career), and write down the factors that underpinned this feeling.

Add these to the “Things That Make Me Proud” table on page 17.

1.1.3 What Gives You a Sense of Fulfillment?

We'll repeat this for the last time, looking at situations where you've felt a real sense of meaning and fulfillment.

Fulfillment Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Fulfillment Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Fulfillment Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Fulfillment Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Fulfillment Situation:	
Factors Contributing: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> 1. 2. 3. </div> <div style="width: 45%;"> 4. 5. 6. </div> </div>	

Now look through the factors you've identified in these situations, and identify the five factors that are most important to you. Add these to the "Things That Make Me Feel Fulfilled" table on page 17.

1.2 Exploring Your Values

The next thing to do is to explore your values. Values are "stable, general beliefs about what is desirable."¹ They are the things that you hold to

be important about the way that you work and live your life, if you are going to be completely authentic and true to yourself.

If you are going against your values in the way that you live and work, you're likely to be uncomfortable and unhappy with what you're doing. By contrast, if you're working in a way that is aligned with your values, you're much likelier to be happy and satisfied.

Your values are the things that you hold to be important about the way you work, and the way you live your life.

¹ Feather NT. 1988. Values, valences, and course enrollment: testing the role of personal values within an expectancy-value framework. *J. Educ. Psychol.* 80:381–91.

What's interesting is that different people can have quite different values, which is one reason why one person's dreams and life choices can be radically different from those of another person.

It's also why it's so important that you chase your own dreams and not those of other people – even if these other people are loving parents who just mean the best for you.

So let's discover what your core values are!

Start by looking at the things that make you happy, proud, and fulfilled on page 17, and identify any values that emerge from these lists. Write these down the table below.

Possible Values:	
1.	5.
2.	6.
3.	7.
4.	8.

Next, look at the list in figure 1 (next page), which shows 150 values that different people think are important in the way they live and work.

All of them are important to some people in some situations.

But which ones are important to you?

Select the five values that are most important to you in the way you live your life. (If a value that is important to you is missing, add it in.)

Then consolidate these two lists, and write down the five values that are most important to you on the "My Most Important Values" table on page 17.

Have you heard the tale of the old Cherokee, teaching his grandson about good and evil?

He told him that everybody has two wolves fighting inside of them. One wolf is good, loving, humble, benevolent, and honest. The other is greedy, envious, selfish, and arrogant. The little boy looked at the old man intently and asked, "Which wolf wins?" The grandfather replied, "The one you feed – that one will surely win."

Our values determine which wolf we feed.

Figure 1: Common Personal Values

Please Note: If a value that is important to you is missing, add it in!

Accountability	Excitement	Persistence
Accuracy	Expertise	Philanthropy
Achievement	Exploration	Piety
Adventurousness	Expressiveness	Positivity
Altruism	Fairness	Practicality
Ambition	Faith	Preparedness
Assertiveness	Family-oriented	Professionalism
Balance	Fidelity	Prudence
Being the best	Fitness	Quality-oriented
Belonging	Fluency	Reliability
Boldness	Focus	Resourcefulness
Calmness	Freedom	Restraint
Carefulness	Fun	Results-oriented
Challenge	Generosity	Rigor
Cheerfulness	Goodness	Security
Clear-mindedness	Grace	Self-actualization
Commitment	Growth	Self-control
Community	Happiness	Selflessness
Compassion	Hard Work	Self-reliance
Competitiveness	Health	Sensitivity
Consistency	Helping Society	Serenity
Contentment	Holiness	Service
Continuous Improvement	Honesty	Shrewdness
Contribution	Honor	Simplicity
Control	Humility	Soundness
Cooperation	Independence	Speed
Correctness	Ingenuity	Spontaneity
Courtesy	Inner Harmony	Stability
Creativity	Inquisitiveness	Strategic
Curiosity	Insightfulness	Strength
Decisiveness	Intelligence	Structure
Democratic	Intellectual Status	Success
Dependability	Intuition	Support
Determination	Irreverence	Teamwork
Devoutness	Joy	Temperance
Diligence	Justice	Thankfulness
Discipline	Leadership	Thoroughness
Discretion	Legacy	Thoughtfulness
Diversity	Love	Timeliness
Dynamism	Loyalty	Tolerance
Economy	Making a difference	Traditionalism
Effectiveness	Mastery	Trustworthiness
Efficiency	Merit	Truth-seeking
Elegance	Obedience	Understanding
Empathy	Openness	Uniqueness
Enjoyment	Order	Unity
Enthusiasm	Originality	Usefulness
Equality	Patriotism	Vision
Excellence	Perfection	Vitality

1.3 Understanding Your Needs

Just as your values are likely to be subtly different from those of other people, so are your needs.

(Here, we're defining a "need" as something that is essential to your sense of well-being, which motivates you to take action to meet that need.)

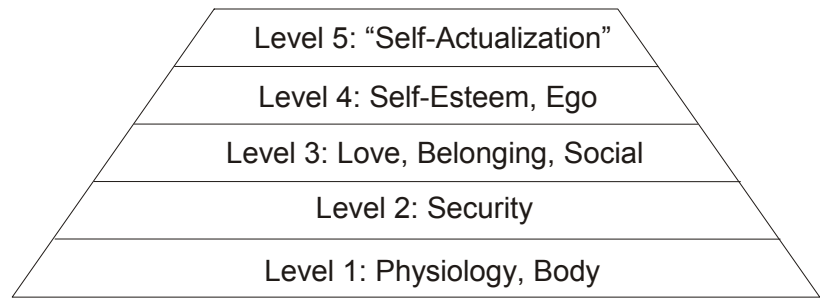
From a "big picture" perspective, people's needs are similar.

You may be familiar with the idea of Maslow's Hierarchy of Needs (see the diagram above right): this argues that people address their needs in a fixed order, starting with basic physiological needs, and moving on to security, a feeling of belonging, a need for self-esteem and, finally, a need for "self-actualization" (this is the need to be "everything that you can be.")

While this isn't perfect as an idea, it gives a useful starting point for thinking about needs. (You can learn more in the Mind Tools article on Maslow's Hierarchy, [here](#)).

As part of this process, we'll assume that you've met all the relevant needs on levels 1 and 2 – i.e. that you have enough to eat, that you have shelter, that you're reasonably healthy, and that you feel reasonably secure. (If this isn't the case, these needs have to be addressed as a matter of priority!)

But are your needs being met on levels 3, 4 and 5? This is where we need to look in more detail at



Maslow's Hierarchy of Needs

the needs that people can have at these levels, so you can see whether these needs are being met.

Figure 2 on the next page shows a list of many of the most common needs that people have on these levels. As you read through figure 2, think about the people around you – you're sure to be able to identify individuals who clearly need some of these things, and others who have different needs.

Just as others have their very-evident needs, so do you!

Now, look at the list in figure 2, and identify the needs that most affect you, whether they're unmet or already met. (Take care not to underestimate the importance of needs that are already met: You'll want to make sure that they are met in the future, too!)

And, again, if an important need of yours is missing, write it down in figure 2.

Then identify your top five needs and write them down in the box on page 18.

Meeting your needs is essential to your sense of well-being.

Figure 2: Common Needs

Accomplishment	Friends	Pleasure
Acceptance	Fun	Power
Adventure	Honesty	Quiet
Authority	Humor	Recognition
Balance	Influence	Respect
Belonging	Justice	Responsibility
Clarity	Knowledge	Safety
Competence	Love	Security
Connection	Mastery	Self-Esteem
Control	Morality	Service
Discipline	Opportunity	Significance
Duty	Order	Spirituality
Fairness	Peace	Trust
Freedom	Participation	Variety

1.4 Drawing This Together

Well done for reaching this stage! From what you've written on pages 17 and 18, you should now have a good understanding of what makes you happy, proud, and fulfilled.

You should also understand the values that you want to bring to your life and work, as well as the

personal needs that must be met if you are to lead a good life.

This is important – these are good starting points for thinking about your life and your dreams. They also help you to make choices, and plan your goals in such a way that they bring you success, happiness, and fulfillment.

Exploring You: Summary

Things That Make Me HAPPY:

- 1.
- 2.
- 3.
- 4.
- 5.

Things That Make Me PROUD:

- 1.
- 2.
- 3.
- 4.
- 5.

Things That Make Me Feel FULFILLED:

- 1.
- 2.
- 3.
- 4.
- 5.

My Most Important VALUES:

- 1.
- 2.
- 3.
- 4.
- 5.

My Most Important NEEDS:

- 1.
- 2.
- 3.
- 4.
- 5.

2. Explore Your Dreams!

Now that you've explored what makes you happy, proud, and fulfilled, as well as your needs and values, it's time to have fun and explore your dreams!

Think about all of the dreams you've had about how the future might be – different dreams at different times, looking towards different, perfect futures. Now is the time to bring them all together, and to dream some more!

"Dream no small dreams for they have no power to move the hearts of men."

Johann Wolfgang von Goethe, German poet

On the worksheets on the following pages, write down:

- **The things you'd like to do in the future**, whether these are things you'd love to do with your career, sports you'd like to try out, qualifications you'd like to gain, or activities that help other people.
- **The things you'd like to be**, whether this is CEO of your company, an intrepid traveler, a great parent, or a dynamic community leader.
- **The places you'd like to go**. Perhaps you've always wanted to go to Rome, or Mauritius, or Istanbul, or Montreal? Perhaps you want to swim with sharks over the Great Barrier Reef, or visit Petra or Angkor Wat? Or perhaps there's a particular retreat you'd dearly love to take?
- **The things you'd like to have**. Maybe there's a certain car you're hankering after, an Apple MacBook Air notebook computer, or an apartment by the sea? Write it all down!

Don't put any constraint on the size or quantity of your dreams!

Let your mind run riot, and **try to list at least 100 dreams!**

The aim here is to list everything you've ever wanted to do, have or be, and everywhere you've ever wanted to go. And don't constrain your dreams – make sure that you think big!

If you get stuck, or get fixated on a particular type of dream, make sure that you **explore dreams in all of the categories below** (we'll also use these later, but see page 26 if you need more information on what these are):

- Artistic pursuits.
- Career.
- Education and self-development.
- Relationships.
- Finances.
- Health and fitness.
- Passionate pursuits.
- Possessions.
- Public service.
- Spirituality.

This helps you develop dreams in all areas of your life, not just a few.

Also, remember the work you did in the **last section** – look at the lists you wrote on pages 17 and 18, and think what sort of situations, positions, or things might help you repeat these feelings.

So, start now, and let your imagination run free!



List 100 Dreams Below

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.
- 21.
- 22.
- 23.

List 100 Dreams Below

24.

25.

26.

27.

28.

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45.

46.

47.

List 100 Dreams Below

48.

49.

50.

51.

52.

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69.

70.

71.

List 100 Dreams Below

72.

73.

74.

75.

76.

77.

78.

79.

80.

81.

82.

83.

84.

85.

86.

87.

88.

89.

90.

91.

92.

93.

94.

95.

List 100 Dreams Below

96.

97.

98.

99.

100.

If you haven't written down 100 dreams, revisit the suggestions and checklists on page 19, and use these as starting points for thinking about what you might do. Make sure that you cover all of the points mentioned!

However, don't worry too much if you haven't quite got to 100 dreams. The idea of this exercise is to have written down everything you can possibly think of, so just list as many as you can.

"People need dreams. There's as much nourishment in them as food."

*Dorothy Gilman,
American
novelist*

If you've filled up all of these pages and you still haven't finished writing down dreams, congratulations!

Just print off a few more pages, and keep on writing!

3. The Choices That Define Your Life

If you wrote down 100 dreams (or more) in the last section, well done!

"The hunter who chases two rabbits catches none."

Author unknown

However many dreams you've identified, you never stop dreaming, so keep on adding to your list!

You now need to start the process of choosing between your dreams, so that you can focus on the most important of them.

After all, if you spread your efforts too thinly, you'll most likely achieve nothing at all, just as the hunter in the quote above will go home hungry. Achieving dreams takes real energy and effort!

More than this, we live in an extremely competitive world, and many dreams are competitive – if someone else achieves them, they can crowd you out and prevent you from achieving them too. After all, only one person gets that promotion; there's usually only one gold medal winner in each event; there's a limited supply of seafront apartments in prime locations; and only a few people can be recognized as world experts in their field.

What this means is that, if you want to achieve big dreams, you have to be extremely focused. And the bigger the dream, the more focused you have to be!

In this section, we'll help you narrow your dreams down step-by-step, so that you can identify the very best dreams to pursue. Once you've done this, in the next section, you can start converting these dreams into powerful, compelling goals: ones that will power you towards their realization.

3.1 Narrowing Down Your Dreams

To do this, we'll do the following:

1. "C-List" the dreams you don't really care about.

2. Identify your top dreams for each area of your life.
3. Choose from these to create a final list.

We go through these steps in the next few pages.

3.1.1 "C-List" the Dreams You Don't Really Care About

The first step is really simple – go through your list of dreams, and mark the weaker dreams with a "C" (showing their priority, from A (high) to C (low)). This shows that these are less important dreams, and that you won't focus on them in the short term.

It will be obvious which dreams should be C-listed when you compare them with the strongest dreams – they'll lack substance, and they'll seem pale and insignificant by comparison. They'll also likely have little connection with the things that make you feel happiest, proudest, and most fulfilled, or with the values and needs that you identified in section 1. C-list as many dreams as you sensibly can.

Don't worry too much about C-Listing a dream – once you've achieved your most desired dreams, you can always return to the ones that you didn't choose first time round.

3.1.2 Identify Top Dreams in Different Areas of Your Life

Now for your "A-list" dreams!



Before we start A-listing, it's worth taking care to achieve balance across different areas in your life.

Often, people think about dreams and set goals in only a few life areas – typically in their careers and in sport, but rarely elsewhere.

“Follow what you are genuinely passionate about and let that guide you to your destination.”

*Diane Sawyer,
American journalist*

This can leave people as high achievers in these areas, but with a stunted, constrained, and often unhappy life elsewhere. We all know about the fabulously successful businessman who missed seeing his children growing up, or the person who has amassed a great deal of money, but whose health fails before he can retire and enjoy it. This is why we suggest that you explore dreams in all areas of your life:

- **Artistic pursuits:** Dreams about your creativity, for its own sake, or for fame or reward.
- **Career:** Dreams of how you want your career and working life to develop.
- **Education and self-development:** Dreams about acquiring knowledge, qualifications, and expertise, and how you'd like to grow in the future.
- **Relationships:** Dreams of a happy family, and of being a great parent to happy children.
- **Finances:** Dreams of acquiring deserved wealth, of enjoying special experiences during your working life, and of living a happy, secure, and enjoyable life in retirement.
- **Health and fitness:** Dreams of physical or athletic achievement, and of good health.
- **Passionate pursuits:** Things that would be fun and enjoyable to do, perhaps activities that you want to enjoy, places you want to go, or interesting experiences.
- **Possessions:** Things that you'd like to own and enjoy.
- **Public service:** Dreams of things you'd like to do to make the world a better place for other people.
- **Spirituality:** Dreams of how you want to develop your mind or soul, or your relationship with a supreme being or beings.

If there's a life area that's important to you that's missing, just add it in. And if any of these life areas are of no interest to you, strike them out.

For each of these areas, use the worksheet below to identify the top 1, 2 or even 3 dreams that matter to you in each category, but **aim to have no more than about 10 dreams in total.**

To do this, go through your list of 100 dreams (skipping the C-Listed ones) pulling out the ones that you are most passionate about. And don't worry too much if you can't cut down to 10 dreams – in a few pages time, you'll learn a great technique for making difficult choices.

Life Area	Dreams
Artistic Pursuits	1. 2. 3.

Life Area	Dreams
Career	1. 2. 3.
Education and Self-Development	1. 2. 3.
Relationships	1. 2. 3.
Finances	1. 2. 3.
Health and Fitness	1. 2. 3.
Passionate Pursuits	1. 2. 3.
Possessions	1. 2. 3.
Public Service	1. 2. 3.

Life Area	Dreams
Spirituality	1. 2. 3.
Other	1. 2. 3.

3.1.3 Cut These Down to Your Final “A-List”

You should now have a reasonably short list of attractive, important dreams in different areas of your life.

Some of these dreams may be quite large (“Set up my own business”) while some may be quite small (“Spend four days visiting Rome”).

How many dreams you should end up with really depends on the size of the dreams, how much you want to achieve them, and how much capacity you have to achieve them:

- If one dream is of huge importance to you, then maybe there’s only room in the next part of your life for that one big dream, and a few quite small dreams in other areas. If you try to achieve more than one very big dream, then you risk splitting your effort, and failing to achieve anything.
- If dreams are smaller and easier, then you can reach them comfortably. Only you can decide how many paths you want to follow.
- If you have many demands on your time (for example, if you’re a busy parent) scale back on the number of dreams that you try to achieve – otherwise you risk “spreading yourself too thinly” in all areas of your life.

You may be able to choose an appropriate number and mix of dreams right away. **If so, go straight to section 3.2, and fill the list out.** If not, carry on reading!

3.1.4 More Help Finding Your “A-List”

If you’re still struggling to choose which major dream or dreams to work towards, you can use a technique called Grid Analysis to choose between them. Grid Analysis is a great technique to use when you need to choose between options, taking many different factors into account. We’ll guide you through using it below:

1. Identify the criteria you’ll use in your decision.

Start with identifying the five most important criteria that you’re going to use to make your choice.

A really good way of doing this is to look at the “Exploring You: Summary” pages (see pages 17 and 18) from section 1 of this workbook, showing your key happiness, pride and fulfillment factors; your most important values; and your most important needs. Some of these are very likely to make great decision-criteria.

Choose the five criteria that you’re going to use, and list them as the **column headings** on a print-out of the Grid Analysis Worksheet on page 30.

2. Decide how important each criterion is.

For each of these criteria, give it a score of 1 (not very important) to 5 (very important) to show how important it is relative to the other factors.

This is the **weighting** you'll apply to this factor. (You can give two or more criteria the same score.)

List these weightings underneath the appropriate column header in the worksheet.

3. Set up the grid. List the dreams that you want to compare as row labels on the worksheet.

4. Score each dream.

First, work your way across the table for each dream, and score how well that dream scores for each of the criteria you identified in 1, above. Use a scale of 0 (very badly) to 5 (very well). Write this score above the diagonal line in each cell.

For example, if you were rating one of your dreams against a criterion "Working with a great team," and the dream gave you a strong opportunity to do this, you'd record "5" above the diagonal line in the cell.

5. Now weight this score.

If one of your criteria doesn't matter very much to you, then even a great score for it shouldn't contribute much to the overall decision. However, if it's something you care a lot about, then it needs to count appropriately!

Now work your way through the rows, multiplying your score for that cell by the weighting for the column. Record this under the diagonal line in each row.

For example, in the example above, if you'd scored "Working with a great team" as having an importance of 3, you'd record "15" below the diagonal line in the cell. This gives your **weighted scores**.

6. Add up the weighted scores for each dream.

This gives a total score for that dream, allowing you to compare how well one dream compares with another. The higher the score for the dream, the better fit it has.

7. Finally, "reality check" your answer.

Before you go ahead, test your answer against your gut instinct. Does it feel right? If not, ask yourself whether the criteria you've selected are correct, or whether you've weighted these criteria correctly.

For more information on Grid Analysis, see the Mind Tools article [here](#).

It's important that you're completely comfortable that your choice is correct!

Happy with your dreams "A-List"? Now it's time to make those dreams happen!

(If you're still not happy, work carefully through the worksheets you've completed so far, and see if you've missed something important out.)

Grid Analysis Worksheet for Dream “A-List” Identification (print to use)

Criterion					
Weighting					

Dream						Totals

3.2 Writing Your A-List

Once you've selected the dreams that you want to achieve, think about how these fit with other dreams, and with the shape of your life.

If you've chosen a really big dream to work on, then there may only be room for a few smaller dreams to add color and flavor to your life.

Choose a final list of the dreams that you can work towards with a strong likelihood of success. Write these down below. (But remember that you don't need to fill the table!)

My Top Dreams

3.3 Checking Your Dream List

The last thing to do in choosing your dreams is to make sure that they're going to be as good as you think they are.

After all, many things that look exciting and glamorous when you first look at them can be much less attractive when you've achieved them.

This is why people say "Be careful what you wish for!"

The check is simple: Review your chosen dreams against the lists you drew up in the "Exploring You: Summary" tables on pages 17 and 18 of this workbook.

"Our lives are a sum total of the choices we make."

*Dr Wayne Dyer,
American author*

Make sure that the dreams you want to work towards give you these things. If they don't, are these dreams that you should be chasing?

Remember that it's much better to scrap a dream now (with only a few minutes invested in it) than to work for years to achieve it, only to find that you're not enjoying what you've worked to achieve!

And make sure that you're not trying to achieve too much: There are only so many hours in a day,

and you may have to earn a living serving other people at the same time that you're pursuing your dreams.

After all, remember the quote at the beginning of this section: "The hunter who chases two rabbits catches none!"

4. Creating Powerful Goals



In the last section, you identified the dreams you want to achieve.

So, how are you going to achieve them?

The answer is that you need to turn them into compelling goals that you want to work towards; and then organize yourself so that working towards these goals is a central part of the way you work.

strongest and most reliable predictors of achievement is whether or not someone knows about goal setting, and uses it to guide their work.

By setting goals well, you can map your progress along the route to your dreams, and keep focus on your ultimate destination.

What's more, you can quickly distinguish between activities that contribute to the achievement of your dreams, and distractions that are keeping you from achieving them.

Converting your dreams to goals will turn vague aspirations into precise, motivating targets.

By working effectively with goals, you can:

- Focus your attention and effort towards activities that help you achieve your dreams.
- Manage your progress towards these dreams, so that you can achieve them as quickly and easily as possible.
- Motivate and energize yourself to achieve these dreams.
- Justify the time spent learning the skills and strategies needed for success.
- Encourage yourself to persist in the face of adversity.

Being organized about this is so important!

If you're not organized, your dreams will stay precisely as... dreams. It's by organizing yourself, and working step-by-step towards them, that you'll turn them into reality.

In this section we look at setting strong and compelling personal goals. In the next section, we look at how you can organize yourself to achieve them.

Being organized about your dreams is important. Otherwise they will simply remain as dreams.

4.1 Why Set Goals?

Goals are targets that you set, and that you work to achieve. In the context of your dreams, they're the milestones along the route to realizing them.

"Goal setting" is the process of setting these goals. And it's a process that's routinely used by the world's most successful people – whether they're business people, athletes, or performers in other areas – to propel themselves to success. Many studies have shown that one of the

4.2 Setting Powerful Goals

Now, we're going to take your A-list dreams, and convert them into goals. This turns them from being vague aspirations into hard, precise, motivating targets that you want to achieve.

To do this:

- Put the dream into **positive, emotionally intense** language.
- Express it **clearly**, and unambiguously. (Don't say "do my best," and don't leave any "wiggle room"!)
 - Make it **measurable**, so you know whether you've achieved it or not.
- Make it **achievable**, but only just. It's been shown time after time that people with difficult-but-achievable goals do much better than people with moderate goals.
- Set a clear **date** by which you'll achieve the goal.
- Express it in the **present tense**. This makes it so much more powerful!

Tip 1:

You can remember this using the mnemonic SMART when setting goals. This stands for:

- **S**pecific – i.e. clear and unambiguous.
- **M**easurable.
- **A**chievable.
- **R**elevant – (but it will be if it's one of your dreams!)
- **T**ime bound.

And remember to keep your goals **positive**, and **emotionally intense** too!

Tip 2:

If you've only just set the goal, you may not know enough about it to set a credible completion date.

If so, make one of your first goal-related activities a research action – to research the steps needed to complete the goal and assess the time needed.

Also, don't worry if goals seem vast, or have far away completion dates – we'll look at how you can organize yourself to achieve these goals in the next section.

Tip 3:

Once you set your goals, use techniques like [Visualization](#) and [Treasure Mapping](#) to make them more real, and to build your commitment to them.

As an example, imagine that one of your dreams is to walk the Inca Trail in Peru.

Your goal might be expressed as "It is April 31, 2015. I have just walked the Inca Trail in Peru. I have climbed steep and precipitous paths, seen the long views from the top of the Andes, walked through beautiful cloud forests, and have stood at the Sun Gate of Machu Picchu, looking down on the ancient ruins."

4.3 Setting Your Goals

Now do this yourself on the next page, by converting the dreams you've chosen into powerful, emotionally intense goals!

My Dream:

My Goal:

My Dream:

My Goal:

My Dream:

My Goal:

My Dream:

My Goal:

My Dream:

My Goal:

My Dream:

My Goal:

My Dream:

My Goal:

My Dream:

My Goal:

4.4 Identifying “Milestones” and First Steps

It may be obvious how you’re going to achieve some of your goals. Others may seem huge and intimidating, or may have so many unknowns within them that it’s hard to plan how to achieve them.

Very large goals may involve completing large, complicated projects. The completion of these projects may be so far in the future that the goal has little immediate motivational value.

What’s more, the complexity of the project may mean that a great deal of work has to be completed before you know the full scope of what you need to achieve.

Make sure that you have a first step goal for each of your major goals. This is the first step you need to take in order to reach a goal.

This is where you need to start thinking about milestone goals and first-step goals.

With milestone goals, the analogy is with milestones beside the road on a long journey. It’s much easier to motivate yourself to reach the next milestone, than it is to motivate yourself to race towards a far-off goal. Similarly, it often makes sense to plan only the next step of the

journey in detail, rather than plan everything at the same time.

If you have a particularly large goal, break it down into a series of smaller milestone goals, which you’ll reach one after the other. And, if necessary, break the first of these milestone goals down into smaller goals, until each goal is achievable in a short period of time. Just make sure that each of these goals is written to be powerful and motivating! (See section 4.2.)

In particular, make sure that you have a small, clearly written and powerful first step goal for each of your major goals. This is an activity that will take no more than 2-3 hours to complete, but will give you a great start in working to achieve the goal.

Where you’ve set a new, large goal, and you’re not sure what you need to do to achieve it, then good first step goals are to research the subject in more detail, or to plan how you’ll do this research.

Now, on the next page, break three particularly large goals down into milestone goals. Then define a short first-step goal for each of these projects.

My Major Goal:

My Milestone Goals:

1.

2.

3.

4.

5.

6.

7.

8.

My First Step Goal (No More Than 3 Hours to Complete):

My Major Goal:

My Milestone Goals:

1.

2.

3.

4.

5.

6.

7.

8.

My First Step Goal (No More Than 3 Hours to Complete):

My Major Goal:

My Milestone Goals:

1.

2.

3.

4.

5.

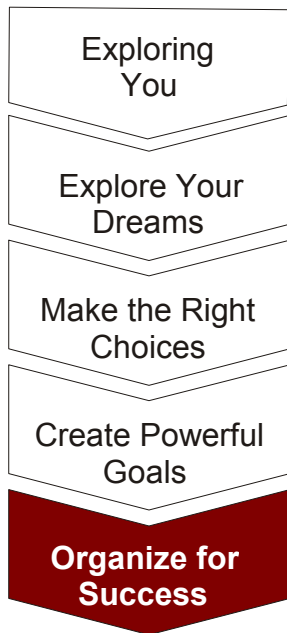
6.

7.

8.

My First Step Goal (No More Than 3 Hours to Complete):

5. Organizing for Success



By this stage you should have converted your dreams into powerful, attractive goals. And, where these goals are particularly large, you should have created milestone goals and first step goals to get you on your way.

If you have done this, well done! You should already be feeling your levels of motivation increasing!

However, how are you going to find time to

work on even these first-step goals if your calendar is already full?

The answer is to create an integrated organizational system that will embrace **both** your goal-related activity **and** the everyday items that are just part of your job.

Why? Because unless you make goal achievement a normal, routine part of the way you run your life, you risk forgetting your goals, and getting overwhelmed by the trivial day-to-day activities that hold most people back.

"Discipline is the bridge between goals and accomplishment."

Jim Rohn, American businessman

This is where it's useful to organize your time using an Action Program.

5.1 Using a Simple Action Program

An Action Program is really just a two-part To-Do List. The two parts are:

1. A "Project Catalog" (more on what we mean by "project" below!)
2. A "Next Actions List."

5.1.1 Creating Your Project Catalog

For the purposes of the Project Catalog, there are three types of things which count as "projects" here:

1. **Your Goals:** From this point on, your goals are projects, and they need to be managed as such, professionally, and within a suitable organizational framework.
2. **Traditional Projects:** This list will also include conventional projects as most people understand the term – pieces of work that have defined beginnings and ends. These can be projects that you're managing at work, such as "Design and document new induction process," or they can be projects in your personal life, such as "Replace kitchen."
3. **Regular Responsibilities:** Crucially, though, your Project Catalog should also include all of the **ongoing areas of responsibility** that make up your job. For example, if you're an accountant, you might have to prepare the management accounts every month. In a way, that's a new project each month, but you might not think of it like that because you're repeating an established process each time. If you're a manager, "Quarterly performance appraisals" with your team would also go into your Project Catalog.

For each of these projects, you need to list the actions you need to take to complete them.

OK, now that you're clear about the concepts, start creating your Action Program by opening up a blank spreadsheet or word processor document on your computer (choose the approach you're happiest with). Label the first sheet "Project

Catalog” and the second “Next Actions.” Then follow these steps:

Step 1

Enter each of your major goals as a line on the Project Catalog, along with a project number. (We recommend that you number them 10, 20, 30 and so on – that way you can insert a project into the list later, as, say, project 23, and find it quickly.)

Step 2

Where you’ve broken major goals down into milestone goals and first-step goals, open up a space under the goal in the Project Catalog, and type these in.

Step 3

For other goals and projects, brainstorm and list the steps you need to complete them. For small goals, this may be a simple list of the small, 1-3 hour tasks that you need to do to complete the project. For larger projects, this may be a list of

major headings, with only the first major heading broken down into small tasks. For projects you don’t fully understand, you may need to set just one first-step goal: To plan how you’ll find out everything you need to know about the subject.

To see what we mean, have a look at the example Project Catalog below. These show the entries for the following goals:

- By December 31, 2016, I will have walked the Inca Trail in Peru. I will have climbed steep and precipitous paths, seen the long views from the top of the Andes, walked through beautiful cloud forests, and explored ancient Inca cities.
- By December 31, 2028, I will have sailed around the world. I will have spent two years sailing from port to port in my own 50-foot yacht, enjoying each place that I’ve stopped and learning much more about the people I meet.

Example Project Catalog

Project/Action number	Item
10	Walk the Inca Trail – “By December 31, 2016, I will have walked...”
10.1	Buy guidebook to Peru.
10.2	Search Google for information.
10.3	Research travel companies.
10.4	Work out which inoculations I need, and their timing.
10.5	Choose which tour I want to take.
10.6	Book weeks away from work.
10.7	Book trip.
20	Sail Around The World – “By December 31, 2028, I will have sailed around...”
20.1	Find out how to qualify as a yacht skipper.
20.2	...

Once you've set up the goals on your final list as projects in the Project Catalog, add in **all** of the other "projects" you're working on at work and in your personal life (this can take some time!)

This then gives you a master list of everything that you want and need to do.

Note:

Setting up a project catalog can take a while, especially the "regular responsibilities" section. But spending time doing this is well worthwhile as these things may not change often. Once you've got them down once, you may be using these entries to organize yourself for years to come!

5.1.2 Creating Your Next Actions List

The "magic" of the Action Program approach comes from the next step, which is to create your Next Actions List. This is essentially a one-page To-Do List, listing all of the small 1-3 hour things that you're going to do **in the next week** to progress the projects you want to work on, whether these relate to your goals or to other activities that you need to complete.

To compile your Next Actions List, scan the projects in your Project Catalog, identify the ones that you want to move forward, and add the next actions for these projects into the Next Actions list. Just make sure that your goal projects are always among the projects that you're progressing!

If you want to make your Next Actions list even more powerful, you can add a "Complete by"

column, and put dates in. If you're using a spreadsheet package, you can then set the conditional formatting function so that these dates show in red if they're overdue. ([Click here](#) for more on Action Programs, including how to incorporate a "Delegated Actions" Log.)

Now, set aside two hours, and create your plan for actioning your goals – your Action Program!

5.1.3 "Working" Your Action Program

Your Action Program is now your organizational control center, which you can use to record and manage everything that you do.

To work the program, simply work on and complete the short 1-3 hour tasks on your Next Actions List.

When you've completed the tasks on your list, go back to the Project Catalog, and bring the next small tasks that you want to complete forward onto the Next Actions List.

Providing that you're bringing forward goal-related actions as well as other actions each time, you'll soon find yourself making progress towards your dreams!

OK – it takes a bit of self-discipline to keep working your system, but achieving your dreams is now as simple as doing just this! What's more, day-by-day you're moving closer to your life-goals!

Note:

Action Programs are particularly useful if you have a broad job role that involves big pieces of routine work or multiple development projects. They're probably less useful if your job involves responding to "inputs," such as customer service queries.

However, even if you decide that an Action Program wouldn't improve your effectiveness at work, it will certainly help you progress your personal goals!

Having read this section, you may realize that you've been using an action plan intuitively. But, by creating a written Action Program, you'll ensure that you don't forget anything, and that you prioritize your next actions effectively. We strongly recommend that you use them to achieve your newly-formed goals!

Moving On...

I hope you've enjoyed using this workbook!

You now have a plan in place so that you can achieve your goals, in 2012, and beyond. Enjoy the journey, and have a great time achieving – and living – your dreams!

We've put a great deal of effort into developing this and our other materials. If you have any suggestions on how we can improve these for the future, then please let us know at customer.helpdesk@mindtools.com.

A handwritten signature in black ink that reads "James Manktelow". The signature is written in a cursive, flowing style.

James Manktelow
CEO
MindTools.com

Mind Tools – Essential skills for an excellent career!