



MIND TOOLS

Essential skills for an excellent career



Life Plan Workbook

Essential skills for an excellent career

The Life Plan Workbook

By James Manktelow

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Version 1.00

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Introduction to the Mind Tools Life Plan Workbook

James Manktelow, CEO, MindTools.com

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, though, people simply don't organize themselves to turn their dreams into reality – and then 'wake up' and 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 12 years of Mind Tools' experience 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 each and every day to set and achieve my own goals. 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 dreams. 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 this achievement an everyday part of your life.

Enjoy using this workbook!



James Manktelow
CEO
MindTools.com



"We're here to help you learn the skills you need for an excellent life and career."

James Manktelow

Mind Tools - Essential skills for an excellent career!

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Introduction

Welcome to the Mind Tools 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 what they're doing 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!

With a little forethought and preparation, you can map out the best possible shape for your future life. And then – admittedly with some hard work, application, and only a little good luck – you can live a life that is rich, full, exciting and worthwhile.

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

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

We start by “Exploring You”. We look at your values, and what gives you a sense of meaning in life. We look at the things that you find satisfying, and the situations in which you've been really happy. And we weigh up your needs right now and how they 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 “Making the Right Choices”, we'll narrow these many dreams down to a core list that you really want to achieve. Don't forget, as you narrow down, that 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 “Creating Powerful Goals”, we turn these dreams into rich, inspiring visions of the future, and 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 learn how to make their achievement an everyday part of your life.



The Life Plan Workbook

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 embarked on a well-charted course towards a happy, fulfilling, and truly satisfying life!

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

1. Exploring You

The first thing you need to do is explore yourself – this is essential if you're going 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 put your finger on exactly what it is that's most important to you, or on the things that make you happy and fulfilled. However, it's worth making the effort to do this, so that you can make sure that the life you choose for yourself is one that will bring lasting happiness.

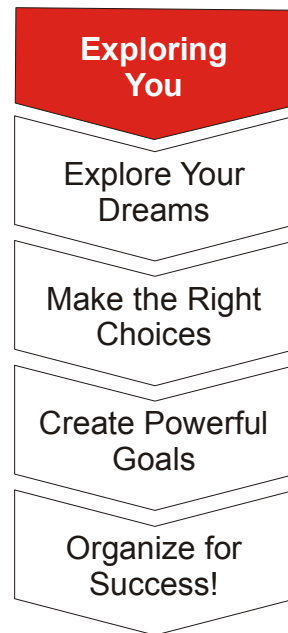
This gives you a starting point for brainstorming the paths you could take, and it gives you something you can check against as you narrow down your dreams, to make sure the dreams you've chosen really will give you the happiness you want.

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

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

And finally, in this section, we'll look at where you are now, so that you can rectify any immediate problems where your needs are not being met, and make sure that your chosen way forward meets those needs.

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



1.1. Understanding Yourself at Your Best

What you need to understand first is what makes you feel happy, what fills you with pride, and what gives you the greatest sense of meaning.

First, we'll identify 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?

Identify up to five situations, in different parts of your life including your career, in which you've been particularly happy. For each situation, identify the factors that contributed to make the situation so good.

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:

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

Happiness Situation:

.....
.....

Factors Contributing:

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

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 20.

1.1.2. What Makes You Proud?

We'll 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 identify 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:

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

Pride Situation:

.....
.....

Factors Contributing:

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

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 Proud" table on page 20.

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

Fulfillment Situation:	
Factors Contributing: 1. 4. 2. 5. 3. 6.	

Fulfillment Situation:	
Factors Contributing: 1. 4. 2. 5. 3. 6.	

Fulfillment Situation:	
---	--

Factors Contributing:

1. 4.
2. 5.
3. 6.

Fulfillment Situation:

.....
.....

Factors Contributing:

1. 4.
2. 5.
3. 6.

Fulfillment Situation:

.....
.....

Factors Contributing:

1. 4.
2. 5.
3. 6.

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 20.

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 to be completely authentic and true to yourself.

If you are going against your values in the way 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 more likely to be happy and satisfied.

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 quite often 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!

Now do this:

Start by looking at the things that make you happy, proud and fulfilled on page 20, and identify any values that emerge from these lists. Write these down here:

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 20.

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

Figure 1: Common Personal Values

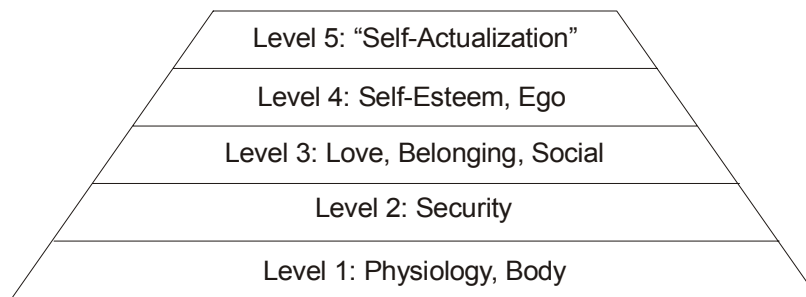
Please Note: If a value that is important to you is missing, add it in!

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, and 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: 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.")



Maslow's Hierarchy of Needs

While this isn't perfect as an idea (you can learn more in the Mind Tools article on Maslow's Hierarchy at http://www.mindtools.com/pages/article/newLDR_92.htm), it gives a useful starting point for thinking about needs.

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 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 this, 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 do this:

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 is missing, write it down in figure 2.

Then identify your top 5 needs and write them down in the box on page 21.

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 20 and 21, 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, and the personal needs that must be met if you are to leave a good life.

This is important – not only are these good starting points for thinking about your life and your dreams, they also help you make choices, and then plan your goals in such a way that they bring you success, happiness and fulfillment.

Exploring You: Summary

My Most Important VALUES:

1.
2.
3.
4.
5.

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 NEEDS:

1.
2.
3.
4.
5.

2. Explore Your Dreams!

So now's the time to have fun and dream!

Think about all 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!

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, educational 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 notebook computer, or an apartment by the sea? Write it all down!



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 you **explore dreams in all of these categories** (we'll also use these later, but see page 29 if you need more information on what these are):

- | | | |
|-------------|---------------|--------------------|
| • Artistic | • Financial | • Public Service |
| • Career | • Physical | • Self-development |
| • Education | • Pleasure | • Spirituality |
| • Family | • Possessions | • Travel |

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 20 and 21, and think what sort of situations, positions or things might help you repeat these feelings. Let your imagination run free!

My 100 Dreams	
1.	
2.	
3.	
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5.	
6.	
7.	
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My 100 Dreams	
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My 100 Dreams	
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My 100 Dreams	
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My 100 Dreams	
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96.	
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100.	

If you haven't yet written down 100 dreams, revisit the suggestions and checklists on page 22, and use these as starting points for thinking about what you might do. Make sure you cover all of the points mentioned!

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

“The hunter who chases two rabbits catches none.”

Author unknown

If you’ve written down your 100 dreams (or more), well done! 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 narrowing your dreams down, 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 none of them at all, just as the hunter in the quote 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 chapter, 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 use this process:

1. “C-List” the dreams you don’t really care about.
2. Identify your top dreams for each area of your life.
3. Cut these down to an appropriate final list.

We go through these steps through 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 the priority, from A (high) to C (low)). This shows that these are less important dreams, and ones that you won’t focus on 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. C-list as many dreams as you sensibly can.

Tip:

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

3.1.2. Identify Your 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. 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 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:** 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:** Dreams of acquiring knowledge, qualifications, and expertise.
- **Family:** Dreams of a happy family, and of being a great parent to happy children.
- **Financial:** Dreams of acquiring wealth, of enjoying special experiences during your working life, and of living a happy, secure and enjoyable life in retirement.
- **Physical:** Dreams of physical or athletic achievement, and of good health.
- **Pleasure:** Things that would be fun and enjoyable to do, perhaps things 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.
- **Self-Development:** Dreams about how you’d like to grow in the future.
- **Travel:** Places you’d love to visit, and things you want to travel to see or do.

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 just can't cut down to 10 goals – in a few pages time, you'll learn a great technique that will help you do this!)

Life Area	Dreams
Artistic	1. 2. 3.
Career	1. 2. 3.
Education	1. 2. 3.
Family	1. 2. 3.
Financial	1. 2. 3.

Life Area	Dreams
Physical	1. 2. 3.
Pleasure	1. 2. 3.
Possessions	1. 2. 3.
Public Service	1. 2. 3.
Spirituality	1. 2. 3.
Self-Development	1. 2. 3.

Life Area	Dreams
Travel	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 dreams in different areas of your life that you find attractive and important.

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 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 another part of your life. 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 more achievable, then you can achieve more of 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, go to 3.1.4 below.

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 guide you through how to use this below:

1. Start by identifying the criteria you want to use in your decision.

Identify 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 20 and 21) from section 1 of this workbook, showing your key happiness, pride and fulfillment factors; your most important values; and your most important needs. The most important of these are very likely to make good decision criteria.

Choose the five criteria that you're going to use, and list them as the **column headings** on the Grid Analysis Worksheet on page 35.

2. Decide how important each criterion is.

For each of these criteria, give it a score of 0 (not important) to 5 (very important) to show how important it is relevant 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 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 criterion. Use a scale of 0 (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 great 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 that criterion shouldn't contribute much for that 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 you're **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 of 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 like the right answer? If not, ask yourself whether the criteria you’ve selected are correct, or whether you’ve weighted these criteria correctly.

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

For more information on Grid Analysis, see the Mind Tools article at this URL:
http://www.mindtools.com/pages/article/newTED_03.htm.

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

Criterion					
Weighting					

Dream						Totals

3.2. Writing Your A-List

Once you've selected the major dreams that you want to work to achieve, think about how this fits 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 each row on this 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 turn out to 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" pages (see pages 20 and 21) from section 1 of this workbook

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

Remember that it's much better to scrap a dream now (with only a few minutes invested in it) than working 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 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

So, if these are the dreams you'd like to achieve, 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 achieving these goals is a central part of the way you work.

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.



4.1. Why Set Goals?

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

Goal setting is the process of setting 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. What's more, research study after research study has shown that one of the 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 these 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.

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.

4.2. Setting Powerful Goals

What we're going to do is 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.

So what we're going to do now is take the dreams you've chosen, and express them as goals.

To do this:

- Put the dream into **positive**, sensual, **emotionally intense** language.
- Express it **clearly**, with the target you want to achieve expressed unambiguously (i.e. don't say "do my best", and don't leave any "wiggle room"!)
- Make it **measurable**, so you know if 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. This stands for:

- **Specific** – i.e. clear and unambiguous.
- **Measurable**.
- **Achievable**.
- **Relevant** – (but it will be if it's one of your dreams!)
- **Time bound**.

And remember to keep your goal **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, set a provisional date, but make one of your first goal-related activities a research action: to research the steps needed to complete the goal and more-accurately 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 the achievement of these goals in the next section.

Tip 3:

Once you set your goal, use techniques like Visualization and Treasure Mapping (see http://www.mindtools.com/pages/article/newCT_94.htm) 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 31 April 2010. 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, converting the dreams you’ve chosen into a 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 embedded within them that it’s hard to even start planning how to achieve them.

Very large goals may involve completing large and highly 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 the full, detailed project plan becomes clear.

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 as quickly as possible, than it is to motivate yourself to race towards a far off objective. Similarly, it often makes sense only to plan 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 goal is written to be powerful and motivating! (See section 4.2.)

In particular, make sure 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 that will get you well started working towards achieving the goal.

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

Action: For up to three particularly large goals, break them down into milestone goals. Then define a short first step goal for each project.

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.

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3.

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4.

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5.

.....

6.

.....

7.

.....

8.

.....

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

.....

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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):

.....

.....

.....

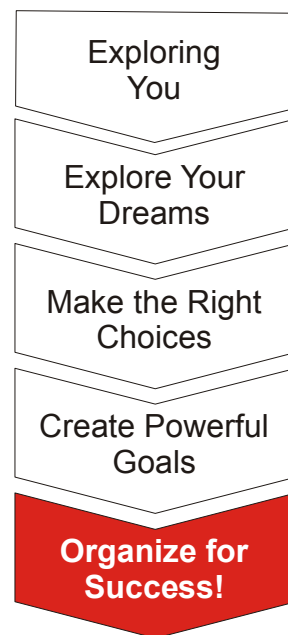
5. Organizing for Success

By this stage you should have converted the dreams you've chosen 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, well done! You should already be feeling your levels of motivation rise!

What you need to do now is set up a system that will support the achievement of these goals. And, to make this achievement an everyday part of your life, you need to integrate it into the same system you use to organize your work.

But why do you need this? Because unless you make goal achievement an everyday part of the way you run your life, you risk forgetting your goals, and getting overwhelmed by the trivial day-to-day tasks that hold most people back from achieving their dreams.



Using a Simple Action Program

The approach we'll use is a simple version of the Action Program described in more detail in "Make Time for Success", Mind Tools' time management and personal productivity course.

From this point on, **your goals are projects** like any others that you're engaged with, and need to be managed as such, professionally, and within a suitable organizational framework.

The Action Program is a highly scalable version of a to-do list, which helps you manage and progress many personal and professional projects simultaneously, while remaining in full control of where you are and what's happening next. As such, it's an ideal framework in which you can manage goal setting and achievement at the same time that you manage the more mundane projects that we all have to complete.

Start creating your Action Program by opening up a blank document in a word processor package like MSWord.

In this simple version of the Action Program, we'll organize this into two sections: A "Next Actions" area (which we'll talk about later), and a "Project Catalog", which we'll discuss now. Enter these as major headings within the document, with the Next Actions area on the first page and the Project Catalog starting on the second page.

Creating Your Project Catalog

Your Project Catalog is a numbered list of all of the personal projects you're running, along with all of the actions you need to take to complete these projects (a project is a series of actions that you need to complete to achieve a goal.) These can include projects you're working on at work, home maintenance projects, vacations you want to organize, a new car you need to buy, and so on.

Importantly for us, the goals you've just created are also projects – some of the most important projects you'll ever work on.

Enter each of your major goals as a line within 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.)

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 copy these in.

For other goals, 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.

Example Project Catalog:

10. Organize Walk Along Inca Trail

By December 31, 2010, 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.

- *Buy Guidebook to Peru.*
- *Search Google for information.*
- *Research trip.*
- *Work out which inoculations I need, and their timing.*
- *Choose which tour I want to take.*
- *Book weeks away from work.*
- *Book trip.*

20. Sail Around The World

By 31 December 2027, 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.

- *Find out how to qualify as a yacht skipper.*
- ...

Once you've set up all of the goals on your final list as projects in the Project Catalog, add in **all** of the other projects you're working on or you want to work 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 to do, integrating the goals you've just set.

Creating Your Next Actions List

The "magic" of this approach comes from the next step, which is to create your Next Actions List. This is essentially a one page To Do List at the front of your Action Program, listing all of the small 1-3 hour steps you're going to take in the next week to progress the projects you want to work on, whether these relate to your goals or to other activity 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 onto the Next Actions list. Just make sure that your goal projects are always among the projects that you're progressing!

See Mind Tools' [Make Time for Success](http://www.mindtools.com/rs/MTFS) course (<http://www.mindtools.com/rs/MTFS>) for more on Action Plans, including the tools you need to delegate and manage activities, and useful techniques for capturing all of the projects you're working on.

"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 Action 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 to the Next Action List.

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

Tip:

One last hint: It's easy to get intimidated by the length of an Action Program, particularly once you've integrated all of the projects you're working on!

To avoid getting yourself overloaded and stressed out, make sure you spend a few minutes each week preparing a proper schedule. By putting yourself in full control of your workload, this will make your work so much more enjoyable!

Find out more at http://www.mindtools.com/pages/article/newHTE_07.htm!

Moving On...

I hope you've enjoyed this Mind Tools Life Plan Workbook!

We have put a great deal of effort into developing this and our other material. If you have any suggestions on how we can improve it for the future, then please let us know at customer.helpdesk@mindtools.com. Alternatively, if you have enjoyed this guide and found it useful, please [let us know!](#)

The Mind Tools web site at www.mindtools.com offers articles on a wide range of important career development and personal effectiveness techniques, as well as a range of related products and services.

By joining our members' area, the Mind Tools [Career Excellence Club](#), you can benefit even further from a rich supply of career-boosting training, information, help and advice, helping you become the very best you can be. Click [here](#) to find out more about the Mind Tools community.

Enjoy using this workbook, and have a great time achieving – and living – your dreams!



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