

## LIFE PLANNING TOOL GUIDE

### **Explanatory Notes:**

This guide is intended to be used to assist you in planning possible life-futures. It is intended to cover all aspects of life that are considered important – not just work and career. It is important to record the date on which it was completed, as it forms the basis for review approximately annually, when progress can be seen and contributes to the motivation and direction for completing it again – replotting the future based on experiences and progress over the preceding year.

**Step 1** is to dream about the future – Firstly, try and put into words a brief statement that describes your life-purpose as you would like it to be. What do you really want to achieve with your life – how do you want to make your life count, or to be seen from your perspective to have been worthwhile. This can be a sense of calling, or something that builds on your special abilities and ‘gifts’.

Then focus on what this could look like in more practical terms. The horizon can be 12 months, usually around 2-3 years, but can also be further out, towards your next life-stage, which ever you are comfortable with. This is the hardest step – you need to push yourself to put aside your current negative constraints and articulate a picture of your life as you would like it to be. What are the important areas of your life that you need to invest in? This includes things like:

1. Financial - Career and working life, work experience, geographic location
2. Intellectual - Education and learning, creative thinking, problem solving, decision making, technology
3. Physical – Health (both physical & emotional), recreation, rest, effective use of time
4. Relational – Family, friends, work colleagues, social networks
5. Spiritual – Peace, wisdom, purpose, hope, love

The importance of each area for you to achieve a life of significance is up to you as an individual to assess and decide.

In most cases, your life-future will involve doing the things you enjoy and give you a sense of achievement – and this will involve facing up to and tackling the challenges that you encounter along the way.

**Step 2** is to go back to the present – and describe the things relating to your current situation that:

- Are of value and can contribute and be built on to help you achieve your future. These are ‘enablers’, and are often the things you have in your resume such as qualifications, work experience, valuable relationships, special interests and hobbies that you enjoy.
- Are negatives and tend to pull you away from achieving your future. These are ‘change points’, and are the things that need to be either managed to minimise impact or removed from central focus in your life, and include such things as inappropriate relationships, a job you dislike, illness, a difficult location, etc.
- It will be helpful to prefix each statement with a (+) or (-) to indicate that it is either an asset or a liability as you plan your future.

It is important to be honest, both in regard to your achievements and potential negatives, as these are important inputs required for the next step.

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**Step 3** is the creative part! This is about drawing a line diagram or developing options of possible paths that could:

- Build on or from your current situation and
- Take you towards your future

These are usually a group of 2 or more strategic steps or connected decision points that go from the left to the right of the planning sheet. Often, one key decision point will build on a number of your 'enablers' as well as deal with a 'change point' – that's what makes it so strategic – it addresses a number of important areas related to your life! Each strategic decision point will build on the previous ones and take you closer to one or more attributes of your life-future.

Allow about one third of the page for this.

The other important part to this step is to come up with another one or two (or three) different but workable options that will take you across the page – in other words, any of these are all possible ways to develop your life to get closer to where you want to be.

The exciting part is that, while you can do a number of things to take your plans forward, it is often external factors over which you have little influence that present you with unexpected decision points as you go forward. These can include:

- A new job or development opportunity discovered,
- A networking relationship that offers something that fits your life-future
- Your life circumstances change unexpectedly, which provides a prompt for life-decisions

The value of this step, is that the picture of the options and key steps provide a framework to take your life forward in a direction that you know is closer to (not further away) where you want to be – it isn't possible to map the future with certainty, but we can at least know the direction we want to head towards, and your life-decisions can be made with confidence in this light.

**Step 4** is about the "so what" part – this is to allow you to record the specific actions that you will commit to in order to progress any of the options or key steps you have mapped out while your mind is still focussed on the subject.

**Step 5** is to "do it"! – This is ***Intentional Living*** – not just good intentions – but getting on with living your life with the knowledge:

- You have thought about and described how you would like your life to be
- You understand your positive attributes and the things that are drawing you back
- You know of at least 2 or 3 options for taking your life forward in a direction that pleases you and takes you towards your life-future, and
- You have documented a specific action plan of the steps to move you forward.

You will be surprised, when you came back and do this again in 12 months, to see how your life has progressed and taken you forward to a better future. There will be a new step 2 (present situation), you may have an updated view on Step 1 (your life-future), and new options will also present themselves for moving forward again.

## **LIFE PLANNING TOOL GUIDE**

It's a wonderful adventure – I'm sure you could write a book on your experiences along the way (even now), of how some of the harder experiences in your life have helped shaped your character and your plans for the next phase of your life.

To assist you in the discipline of review and follow up, you can complete and submit the following form that will put this in place.