

Personal Planning

1 Reflect on the Previous Year:

To start let's look back and celebrate wins and progress in the previous year!

→ List your **Top 5 Accomplishments and Wins** and why it matters to you:

1.

2.

3.

4.

5.

Bonus space for more wins!

2 Diagnose where you want to grow:

Awesome! Now let's see where you want to grow. This is your chance to be brutally honest and raise your standards in every aspect of your life.

**“If you sincerely want to change your life:
RAISE YOUR STANDARDS...
—TONY ROBBINS**

→ The 7 “Fs” Exercise

Score yourself on a scale of 1–5: **1 meaning you're failing miserably** and **5 meaning it couldn't get any better.** *Honesty here is key.*

CATEGORY		SCORE
Faith	How are you doing on your spiritual walk?	<input type="text"/>
Family	Are you showing up the way you want at home with your spouse, kids, parents, etc.?	<input type="text"/>
Friends	How rich are your friendships? Are you building deep relationships with friends?	<input type="text"/>
Fitness/ Health	Without your health all the money in the world doesn't matter. Are you active daily and eating well?	<input type="text"/>
Finances	Money can add security and open up opportunities to improve more and explore. How secure are you in your finances?	<input type="text"/>
Fun	Are you creating the space to have fun!? Too often we get caught up in goals and forget to have fun.	<input type="text"/>
Learning	Are you on a path of learning and growth or stagnant?	<input type="text"/>

Next Steps:

Celebrate your 4s and 5s! Great job! Now circle your 1s and 2s. Those are the first things you need to work on the next year. Fill in below how you want to grow in each area.

→ Where do I want to grow?

Faith

1.

2.

Family

1.

2.

Friends

1.

2.

Fitness

1.

2.

Finances

1.

2.

Fun

1.

2.

Learning

1.

2.

Being vs. Becoming

Now that you've identified the areas you want to grow most in life, it's time to rewire your thinking to help you get there.

We all have an internal script...subconscious standards we hold ourselves to. This shapes our choices, disciplines and reputation. Your current place in life reflects the current standards you hold yourself to.

Being → Who are you currently being that you're not proud of? What behaviors, habits, and actions do you do that you don't like about yourself? Use the space below to write them out. The write why it matters that you change them in your life.

Things you don't like about the way
you're showing up in life:

Becoming → Who do you want to become in life? What habits/behaviors/how do you want to be known? What reputations do you want to have? It helps to picture different people you admire in life. Why do you admire them? What habits do they have you want to adopt? Above you wrote what you want to change about the way you're showing up in life; now you get to write who you want to become as a person. How will you show up in life as that better version of yourself?

"The person I will become..."

Discipline Unlocks Freedom and Impact

Crafting the Disciplines to Transform Your Life

In life we have periods of growth, periods of being stagnant, and times when we're going backwards. Almost every time we feel like we're hitting a growth wall it's because of 2 things:

First, you've run out of vision. You're not clear where to go.

Second, you've hit a discipline ceiling. Your current disciplines and habits can't get you past where you are. A clear vision (what we worked on above) and new disciplines will unlock your next level of growth.



➔ What habits and disciplines would your ideal self have you currently don't?

_____	_____
_____	_____
_____	_____
_____	_____

Unlocking those Disciplines

The way you show up in life is based on the chart below. Your disciplines **ARE** your reputation. To change your disciplines it starts with changing your beliefs. Your beliefs influence your choices; when you make those choices enough they become your commitments (both good and bad). Eventually those commitments become your disciplines and it's those disciplines that **ARE** your reputation.

Beliefs > Choices > Commitments > Disciplines > Reputation

EXAMPLES:

Health

If you truly believe having energy all day (vs. afternoon energy crashes) is important so you can show up in life your best you, you'll make choices to drink water rather than soda, to pick a snack of fruit or veggies rather than potato chips. When you choose health day after day, you have a discipline to be healthy. It's your **reputation**.

Night Owl

If you believe you "get your best work done at night" so you stay up late, wake up late, and no matter how hard you try you "just can't be a morning person." Your beliefs influence your choices to eat late, go to bed late, and sabotage your mornings...reinforcing your belief. "Night owl" is your reputation. To become a person who **LOVES** and **THRIVES** on mornings you must first change your belief.

Finances

If you believe it's hard to reach your financial goals and deep down in your heart you doubt you can hit your biggest goals, you'll make choices to limit your abilities and opportunities... It becomes a commitment to think small and "realistically" and your disciplines and habits support your smaller goals. That is your reputation... thinking small. To change this you need to believe you can achieve bigger.... and you'll start making choices that support that new belief.

➔ **WHAT BELIEFS ARE HOLDING YOU BACK from the disciplines you want to have?**

3 Crafting your New Vision

Great! Now that you've reflected and dug deep to discover what you need to work on to become the person you want to be, now the fun part! Putting it all together into a clear vision for your life. Most people go into the year setting goals for the year, but that's counterproductive if you're not clear where you're wanting to go over the long term and who you need to become to get there. So we're going to start casting vision out there a ways.

→ Your 20 Year Vision

This is your chance to dream. Think big. Where would you absolutely LOVE to be 20 years from today? Write a story of your ideal average day in 20 years. Start from the moment you wake up and end the moment you go to sleep at night. What time do you wake up? What do you see/smell/hear? Who do you wake up with? What is your home like? What do you have for breakfast? What conversations do you have? When do you work? Where? What do you work on? With who? You get the idea. Get details. Get inspired about your own story. Write in the space below or use a notebook.

→ Your 10 Year Vision Story

Now, let's bring it closer. Where do you need to be 10 years from now so you can live your 20 year vision? Write in vivid detail your ideal average day 10 years from today.

→ Your 5 Year Vision Story

Now 5 years... where do you want to be in 5 years so you can be on pace to live your 10 year vision story? Take 10 minutes and write a vivid story from the moment you wake up to the moment you go to bed on your ideal average day 5 years from today.

4 Crafting a Plan for the Next Year Ahead

Pick a theme. Themes are powerful. Write down a short theme for the year that encompasses the growth you want to see. It can be a singular word, a short sentence, a quote. Your choice.

THEME

Your important goals. Now let's brainstorm the goal or goals that you'd most love to focus on this year. Borrow from the 6 "Fs" exercise action items above to start your list. Be specific. They should be measurable.

Health/Fitness:

Ex: Run my first marathon

Recreation (travel, fun, hobbies):

Ex: Learn to play guitar

Financial/Career:

Ex: Increase income to \$10k/mo.

Personal Growth:

Ex: Attend CarrotCamp

Relationships:

Ex: At least 50 dates with my wife

Spiritual/Faith:

Ex: Join a church we love

5 Pre-Load Your Year

Now place your most important goals/actions/milestones on the “Annual Plan” below.

Jan–Mar	April–June	July–Sept	Oct–Dec

→ Buckets to Think About

Professional	Personal	
Learning & Development	Family Events	Friends
Planning Days	Birthdays	Hobbies
Team Training/Retreats	Personal Care	Misogi*
Events		Travel