

This is an excerpt from Martha N. Bryan's book titled,
Loving Your Work, Loving Your Life - Winning Strategies for Business & Life.

For questions, or to purchase a copy of the book,
please contact Bryan & Bryan Associates at (425) 337-1838.



PLANNING THE JOURNEY



*"True maturity only comes when you finally realize
that no one is coming to the rescue."*

~ *Brian Tracy, Author
Maximum Achievement*

4.

You don't make a cake without a recipe, you don't take a trip without a map, you don't build a house without a blueprint, and you don't get the most out of your work and life without a plan of action.

That plan entails defining your mission, clarifying the vision of what you would like to accomplish, defining your values, identifying your dreams and goals, and then developing goals and objectives (the road map) that will lead you to where you want to go. This will take . . .

Analyzing your past:

- Identifying your successes
- Learning from your successes
- Identifying your failures
- Learning from your failures
- Learning from other's successes
- Learning from other's failures

Evaluating your current state:

- Assessing your life - past, present, future
- Identifying your strengths
- Identifying your limiting steps
- Assessing things going well, things that could be improved

Determining your priorities:

- Identifying your dreams and goals
- Clarifying your mission, vision, and values

Designing your future:

- Developing objectives
- Establishing deadlines and checkpoints
- Reviewing progress and making mid-course corrections

The exercises in this chapter will assist you with planning your journey to getting more life out of your work and life.

[Note: The exercises in this chapter have a minimal amount of space for writing answers and brainstorming thoughts. You may either use additional paper when and where needed to fully develop your plan, or you may send our organization an e-mail (bandb@bryanandbryanassoc.com) and we will forward this plan to you. You can then expand the spaces provided for your answers.]

ANALYZING YOUR PAST

Identify Your Successes

Reflect back on your life. What have been your successes? If one of your successes was that you won a yo-yo contest in first grade, write it down. If your successes included going back to school, changing professions, reconnecting with an old friend, making peace with a family member, or stopping a bully from eating your lunch, write it down.

Successes I have had include:

Learn From Your Successes

Reflect back on your list of successes. Think about how those successes helped shape your interest, your actions, and your future successes. What have you learned about yourself?

What was the learning from each success?

Identify Your "Failures"

Reflect back on your life. What have been your "failures?" What have you wanted to have, be, and do but failed to accomplish.

"Failures" I have had include:

Learn From Your "Failures"

Reflect back on your list of "failures." What have you learned about yourself? Think about how those failures helped shape your interest, your actions, and your future successes.

What was the learning from each "failure?"

LEARNING FROM OTHERS

Learn From Other's Successes

You are the owner of your own human development research laboratory. Here you are able to experiment with every possible example of human action and to learn valuable lessons about people who enjoy their work and their life. Think of people you know that are successful -- those that enjoy their work and their life.

List the characteristics of those who love their work:

For those who enjoy their work and life, what action steps are they taking to make a winning life?

Learn From Other's Failures

In your human development research laboratory, you are able to learn valuable lessons from people who, in your opinion, are failures -- those people who do not enjoy their work and their life. Think of people that you have known who struggle with their work and their life.

List the characteristics that you observed:

For those who struggle with their work and life, what actions are they taking to make their work and life a struggle?

EVALUATING YOUR CURRENT STATE

* * *

ASSESSING YOUR LIFE

Identify what is important to you, by answering the following questions with brutal honesty.

About the Past

How did I get to where I am today?

Why do I think and feel the way I do, and what are the factors that have brought me to my current situation?

If I had to live my life over, what one thing would I do exactly the same way?

If I had to live my life over, what one thing would I do differently?

About the Present

Why do I get up in the morning?

Why do I do the work that I do?

Do I work at peak performance levels, or do I "just get by?"

What is my ideal life style?

What is important to me?

Am I living with the right person or people?

Am I living in the right place?

Am I working the right hours?

Does my work match my ideal work, play, rhythm?

Does my work suit my family and social needs?

Do I feel in control?

Am I living my life by design or by default?

What do I not like about my life right now?

What do I like about my life right now?

What do I not like about my job right now?

What do I like about my job right now?

What do I not like about the office right now?

What do I like about the office right now?

What do I not like about myself right now?

What do I like about myself right now?

Do I consider myself a success?

Am I getting what I want from life?

About the Future

How would I describe success?

What would I do if there were no such thing as money?

What epitaph do I want on my tombstone?

What were my childhood dreams?

What do I want to . . .

Do with the life I have left to live?

Experience?

Witness?

Learn?

Be part of?

Change, shape, or leave better?

What do I love enough that I would do it for free?

What gives me so much enjoyment that I yearn to do more of it?

If I could have any job in the world, what would that be?

If I knew I could not fail, what would I do with my life?

In reflecting back on all the jobs I have had throughout my life, which job brought me the most joy and satisfaction?

In reflecting on the job I now have, what part of the job do I especially enjoy?

What do I get the biggest kick out of doing -- even if I am not great at doing it?

What makes me feel the best about myself?

When I daydream, where does my heart go?

What brings me the biggest grin to my face these days,
puts a spring in my step, or a hum in my voice?

If I knew I had only one year to live, what would I
do differently?

If I knew I had only six months to live . . .
what would I say to my family?
what would I do with my family?
what would I do for myself?

VISIONING THE FUTURE

If you could live your ideal life style, what would it look like? Answer the following questions with brutal honesty:

ONE, THREE, FIVE, TEN YEARS FROM NOW

Home Front

- What will be my standard of living?
- What kind of house will I live in?
- What kind of automobile will I drive?
- What kind of vacations will I take?
- What kind of time will I spend with my family?
- What kind of financial support will I provide for my children?

Work Front

- What will be my level of income?
- What kind of position will I have?
- What will be my level of responsibility?
- What will be my level of authority?
- What will be the respect in my field of expertise?

Health Front

- How will my overall general health be?
- What areas will I need to work on?
- What kind of rest, exercise, and nutrition will I need to remain healthy?

Financial Front

- How financially secure will I be?
- What will be my level of savings?
- How will my debt be different than it is today?
- How much money will be enough?
- How much money will I need to set aside for retirement?

Leisure / Social Front

- What kind of friends will I have?
- How much time will I be able to spend with them?
- What new friends will I want to attract?
- What will I like to be doing with my friends?

What kinds of leisure activities will I engage in?

Community Service Front

What causes would I like to champion?

What would I like to accomplish in the community?

What legacy would I like to leave behind?

Continuing Education Front

What degrees or certificates will I have?

What skills will I have that will make my life easier
and more enjoyable?

What additional skills will I seek to obtain that will
make my life easier and more enjoyable?

Other Front

Other areas of your life that are important to you)

STRENGTHS INVENTORY

Think of all the areas of your life -- your role as parent, grandparent, lover, friend, employee, boss, etc. Make a list of all of your strengths (skills and abilities).

The following list may jump-start your thinking:

Intelligent	Analytical
Healthy	Determined
Planner	Committed
Loving relationships	Practical
Enthusiastic	Common sense
Educated	Humorous
Energetic	Unique
Organized	Sensitive
Artistic	Persuader
Flexible	Good Speaker
Supportive	Good Boss
Perceptive	Good Employee
Loyal	Respected
Good parent, spouse, child	Inspiring
Sees the big picture	Have people skills
Innovative	Creative
Approachable	Quick learner

Strengths include:

Strengths that make me unique (those talents and skills you possess that others struggle with):

Have three people you know well, identify your strengths, then compare your list to their list.

LIMITING STEPS INVENTORY

Think of all of the areas of your life -- your role as parent, grandparent, lover, friend, employee, boss, etc. What skills and abilities are you lacking that are holding you back from enjoying your work and life?

Make a list of all your limiting steps:

Ways to eliminate or minimize those limiting steps:

Have people that know you well, identify your limiting steps.

How closely does their list match your list?

What behaviors can you practice to overcome the limiting steps?

What situations will help you practice overcoming your limiting steps?

FINDING THE BALANCE
A PERSONAL ASSESSMENT

In each of the areas of your life, list the specific things that you are satisfied with and the things you would like to see improved. Some things may be listed on both sides. You may feel that although something is going well, there is additional improvement that needs to be made.

	Going Well	Needs Changing
Family		
Health		
Career		
Continuing Education		
Financial Security		
Leisure Social		
Community Service		
Spiritual		
Other _____		

DREAM SHEET

Think back on those high school and college days when you dreamed of your ideal life. Recall all the things that you thought would make life exciting. Also think about all the things you have been dreaming about all of your adult life. Write them down.

At this point, let your ideas flow. Some of the ideas may be in conflict with others, or on closer review, you may decide some are not important dreams -- just keep writing. You will sort those priorities out later.

List all the things you would like to be doing, having, and being in the next three years, five years, and ten years. List things such as who you would like to be living with, where you would like to be living, what you would like to own, and places you would like to visit. List what you would like to be doing in your career and what you would like to be doing in your leisure time.

The following list may jump-start your dream thinking.

Political activity	Relationship building
New / remodel home	Collecting
Vacation home	Travel
Stop smoking	Better public speaker
Degree / license	Better manager
Own business	Lose / gain weight
More quality time with family	Connect with old friend
More fishing	Volunteer
Change jobs / careers	Have more fun
Learn a foreign language	Cosmetic surgery
Climb a mountain	Study family tree
Grow intellectually	Control stress
Study success	Write a book
Retire	Support a great cause
More tennis, golf, skiing	Physical conditioning
Change home landscape	Build self-esteem
Have more leisure time	Have a baby
Go back to college	College paid for child / grandchild
Fly a airplane	Own a Harley

Dream list:

You cannot accomplish all of the things listed on your dream sheet immediately. Review the list you just created and number them in the order of importance. Ask yourself, "If I could accomplish only one dream, what would that be? Two dreams, what would that be?" Three dreams, and so on down the line.

CLARIFYING YOUR MISSION

TWO CHOICES

1 Retirement Speech

Write your retirement speech. What would you like for your organization, boss, and peers to say about you? What would you like for them to say about your accomplishments? How is the organization better because of your efforts? Include as much detail as possible as this will help you to identify goals that are important to you.

2 Your Obituary

Write your obituary. What would you like said about you and your life's accomplishments at your funeral / wake? Reflect on your role as a parent, spouse, significant other, child, boss, employee, friend, team member, etc. Include as much detail as possible as this will help to further identify goals important to you.

YOUR LIFE'S MISSION

Review all of the things you have written in your success plan to this point. Especially review the retirement speech and the obituary you wrote. Based on your analysis, write your life's mission (your life's purpose).

PRIORITIZING DREAMS & GOALS

Based on the evaluation of the key areas of your life (your vision, your values, and your prioritized dream list), identify goals in each of the following areas:

Family

Health

Career

Continuing Education

Financial

Leisure / Social

Community Service

Spiritual

Other

Do these goals support your mission? _____

Do these goals support your vision? _____

Do these goals support your values? _____

MAKING GOALS SPECIFIC -- AN EXAMPLE

The following is an example of an action plan for achieving the goal of obtaining a master's degree. This format can be used for achieving any goal whether it is a personal, career, family, financial, or spiritual goal. This example is included simply as a guide for setting your goals on the following pages.

**GOAL: Complete masters degree program
 in public administration.**

BENEFITS OF REACHING GOAL

- ~ Gain more knowledge and skills
- ~ Meet new friends
- ~ Build self-esteem and confidence
- ~ Gain more respect from others
- ~ Broaden job opportunities
- ~ Increase income
- ~ Obtain self-satisfaction

LOSSES OF REACHING GOAL

- ~ Less leisure time and TV viewing
- ~ Less time to spend with family
- ~ May have to drop some memberships
- ~ Less money while attending school
- ~ Shift in work schedule
- ~ Decrease in time available for work

LIST THE OBSTACLES TO OVERCOME

- ~ Time available to complete degree
- ~ Revised work schedule to attend classes
- ~ Baby-sitter for child while in school
- ~ Money for books and tuition
- ~ Living expenses while in school

STEPS FOR OVERCOMING OBSTACLES

- ~ Resign from community service board
- ~ Do not participate in the foreign exchange student program
- ~ Stop all involvement in political activities
- ~ Ask to be assigned the night shift
- ~ Get a second job on campus
- ~ Offer to exchange baby-sitting services
- ~ Move closer to college
- ~ Move to less expensive apartment

LIST THE PEOPLE WHO CAN HELP

- ~ Boss ~ College counselor
- ~ Parents ~ Spouse

DEVELOP A PLAN OF ACTION

- ~ Meet with college counselor to determine

- course-work needed to complete degree
- ~ Determine how many quarters it will take to complete the degree
- ~ Decide number of courses per quarter
- ~ Determine cost of tuition and books for each quarter and total cost for degree
- ~ Meet with financial aid to determine the assistance available
- ~ Review income, savings, monthly expenses and any additional expenses expected
- ~ And, others _____

SET A DATE FOR ACCOMPLISHMENT

- ~ Meet with counselor by _____
 - ~ Develop detailed schedule for completing program by _____
 - ~ Determine cost of tuition and books by _____
 - ~ Meet with financial aid by _____
 - ~ And, others _____
-
-

MAKING GOALS SPECIFIC

Take the one most important goal for each area of your life, and write a detailed plan of action for accomplishing the goal. Make the goals as specific as possible. If for example, you want to fly an airplane, list what kind of plane, solo, commercial, by when, etc.

FAMILY GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal
 - List the obstacles to overcome
 - List the people who can help
 - Develop a plan of action
 - Set a date for accomplishment
-

HEALTH GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal
 - List the obstacles to overcome
 - List the people who can help
 - Develop a plan of action
 - Set a date for accomplishment
-

CAREER GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal
 - List the obstacles to overcome
 - List the people who can help
 - Develop a plan of action
 - Set a date for accomplishment
-

CONTINUING EDUCATION GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal

- List the obstacles to overcome
 - List the people who can help
 - Develop a plan of action
 - Set a date for accomplishment
-

FINANCIAL GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal
 - List the obstacles to overcome
 - List the people who can help
 - Develop a plan of action
 - Set a date for accomplishment
-

LEISURE / SOCIAL GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal
 - List the obstacles to overcome
 - List the people who can help
 - Develop a plan of action
 - Set a date for accomplishment
-

SPIRITUAL GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal
 - List the obstacles to overcome
 - List the people who can help
 - Develop a plan of action
 - Set a date for accomplishment
-

OTHER GOAL

- Goal** _____
- Benefits of reaching goal
 - Losses of reaching goal
 - List the obstacles to overcome
 - List the people who can help

Develop a plan of action
Set a date for accomplishment

ONE / THREE/ FIVE / TEN YEAR GOALS

MY ONE-YEAR GOALS

The following is my list of one-year goals and the deadlines for accomplishment:

MY THREE-YEAR GOALS

The following is my list of three-year goals and the deadlines for accomplishment:

MY FIVE-YEAR GOALS

The following is my list of five-year goals and the deadlines for accomplishment:

MY TEN-YEAR GOALS

The following is my list of ten-year goals and the deadlines for accomplishment:

ACTION PLAN FOR REACHING GOALS

Create an action plan for each goal that you have just listed.

Daily, Weekly, Monthly Schedule

Goal # 1 _____

Action Plan:

Date	Task
_____	_____
_____	_____

Goal # 2 _____

Action Plan:

Date	Task
_____	_____
_____	_____

STAYING THE COURSE
*** * ***
ACCOMPLISHING GOALS

Reviewing progress / making mid-course corrections:

To stay the course, constantly review your goals, evaluate progress, and make changes when and where needed.

Constantly ask yourself the following questions:

- ~ What am I trying to accomplish?
- ~ What is the most valuable use of my time right now?
- ~ Is what I am about to do leading me to my goal(s)?
- ~ What have I done today / this week / this year that is leading me to my goal?

Making the most of your time:

- ~ At end of day, compare what you did with what you planned to do for the day.
 - ~ Review what percent of your time was spent on the vital few versus trivia tasks.
 - ~ Who were the interrupters?
 - ~ What went right today and what went wrong?
 - ~ What could be done tomorrow to improve the use of your time?
 - ~ What was your prime time period?
 - ~ What was the low productivity period of the day?
-
-

MEASURING SUCCESS

Keep a list of your accomplishments and completion dates. (Review at least quarterly.)

Goal # _____

Date completed _____

Goal # _____

Date completed _____

Goal # _____

Date completed _____

Goal # _____

Date completed _____

Goal # _____

Date completed _____

FINDING THE BALANCE

* * *

A PERSONAL REVIEW

Evaluate progress and identify changes needed in the following areas. (Review at least quarterly.)

	Going Well	Needs Changing
Family		
Health		
Career		
Continuing Education		
Financial Security		
Leisure / Social		
Community Service		
Spiritual		
Other		

**PLANNING & GOAL SETTING STEPS
TO
ENJOYING WORK & LIFE
* * *
A STEP-BY-STEP APPROACH**

Action steps for enjoying your work and your life -- it is a continuous, never-ending process:

- STEP 1** Identify successes
 - STEP 2** Assess progress
 - STEP 3** Create a vision
 - STEP 4** Revisit values
 - STEP 5** Update dream list
 - STEP 6** Establish goals
 - STEP 7** Develop monitoring system
 - STEP 8** Celebrate successes
-
-