

The Personal Planner

A Process for High Achievers

THE PERSONAL PLANNER

PURPOSE: The Personal Planner is a tool for GOAL ACHIEVERS. It will enable them to explore and clarify their goals, to plan for their own growth and learning and to achieve more satisfying results in their lives.

METHOD: Personal planning is an on-going process. It happens naturally. It is a constant part of our daily thinking. Calendars, schedules, appointments, projects, and to do lists are the normal outcomes of this thinking and decision-making. The **Personal Planner** is designed to go beyond these normal time-management tools. It assumes that each person uses one form or another of calendars and appointment books. To-do lists may be done within one of these planners or simply on a notepad. The key to effective time management and personal achievement, however, does not reside in these conventional devices.

Scheduling our time is not difficult, deciding what we want to do is. Personal planning and self-motivation is a deeper psycho-spiritual process. The forces of our subconscious and our biochemistry far outweigh what we may put down in a calendar or a simple to-do list. We may find ourselves avoiding, procrastinating, or forgetting about things we “intended” to do. Despite our rationalizing or excuse-seeking, we have to confront the reality of our own behavior. Often, we do not do the things we really wanted to do. We do not accomplish the results we truly desired. Our productivity, achievement, and satisfaction are not what we would desire them to be. We become discouraged, disappointed and self-judgmental. Worse yet, we may discount our own ability or give up on our dreams.

The problem is that we have not established a way to truly explore what we want. We have not spent the time nor given the attention to get in touch with our inner-selves - our deeper desires and motivation. We have not made clear choices nor set clear goals. If we write down goals at all (few people actually do) those goals may be only a reflection of our first thoughts, they may be what we thought we “should” do or they may be written to please someone else (a manager, spouse, or parent). Further, they may not take into consideration what it will take to achieve them - what changes in skill, knowledge or habits will be required for their accomplishment. Our efforts to achieve these goals may not be driven by deep desire and personal commitment.

This **Personal Planner** outlines a **process** that will overcome these natural and long-standing obstacles to higher achievement. It is a proven and creative method that can help anyone to learn, grow and achieve. Its exercises, methods and forms provide a pathway to personal accomplishment. It will help people make better use of their time, get more desired results and feel greater satisfaction. It is **not a quick-fix** or panacea. It is a process that works if you take the time and care to make it work. It is not complicated or difficult. It just takes doing it. And, if you do, the results will be magical. You will experience more confidence and less stress, more joy and less fear, more results and fewer disappointments. Creative answers and positive

coincidences will increase. You will have more **natural energy, focus and motivation**. You will feel more alert and alive. You'll have more fun and feel "deeply good" more of the time.

The **Personal Planner** is really a **life-long** personal guidance system. The process is repeated each year. It is important to remember that it IS A Process. It reflects the truth that "life is a journey, not a destination." It is built on the experience of high achievers throughout human history. It is based both on psychological truth and common sense. It will evolve as you evolve. Its value will increase with use. Like any process, it takes time to master.

The key is to begin!

The Seven Step Process for Lifetime Planning

Successful Planning involves clarifying one's goals. This process is both creative and analytical. This involves both "greenlight thinking" (exploring our personal desires and possibilities) and "redlight thinking" (deciding what is realistic within a specific timeframe). The Seven Step Process gives us a way to both "think big" about our long-term desires and to "be realistic" about what we will do in the short-term to move along our life's path.

1. **THE MASTER DREAM LIST:** The purpose here is to take the time to look deeply at what we want to do with our lives. It is a creative process. It should be done with "no limits." It should not involve any judgment about what is realistic or possible. We should ask ourselves this question "If money, time and talent were unlimited, what would I really want?" What would I like to have (own or possess)? What would I like to do (experience, travel, adventure, relationships, etc.)? What would I like to be (learn, express, work, ability, competence, personality, character, etc.)?

This self exploration process is best done alone, without interruption and for some extended period of time (segments of about two-hours, each). Just let the mind and heart go. Write down whatever comes? Move on quickly, Maximize the number of items your write down. It does not matter how or if they are organized, or even if they are repetitive. Don't think about them, evaluate them or discount them. They are, at this point, just ideas or possibilities. A list of at least 100 is a good place to begin. You may simply use a lined notepad or you could enter it on your computer (as a word processing document or a spreadsheet).

2. **THE PERSONAL PAYOFF RATING SCALE:** Once you have completed your Dream List (and after you add any new items to it), go back to each item and give it a "current rating" as to its importance to you. A ten-point scale (10 being high) is a good way to do it. The higher the rating, the more that item is important to you; that is, the more satisfied you believe you would be if you achieved it. This rating may change over time and it is not so critical that it be exact. You are simply to assess, given your current life circumstances, how valuable that achievement would be to you.

3. **THE REALISTIC AVHIEVMENT TIMETABLE:** Now is the time to evaluate each item on the Dream List as to its "do-ability." This is probably not an actual word in the dictionary, yet we probably know what it means. It is our estimate of how likely and how soon we think that this item might be possible. Again, use a ten-point scale (10 high) as to its do-ability. If it can be done soon and easily, you would give it a rating or 8, 9 or 10. If it would take a long

time, would involve great difficulty or is something you are not sure is possible for you, then you would rate it as a 1, 2 or 3. Mid-range “do-ability” would get a score somewhere from 4 to 7. These ratings would change over time as you progress and get a clearer vision of what is possible for you.

4. THE LIFE GOALS BALANCING WHEEL: Many people feel that it is important to have balance in one’s life. Researchers have found that placing exaggerated importance or total activity in just one area of life may lead to a sense of frustration, stress and lack of fulfillment. The way you spend your time is, of course, yours to decide. You may wish to check your goals to assess their balance. A simple three way analysis would divide your goals into these areas. Work, Relationships and Personal. Work would include anything to do with your career, business and financial achievements. Relationships would include those items related to your spouse, family, friends and colleagues. Personal would include health, recreation, education (unless work related), self-expression and spiritual goals. You could establish more or different categories depending on your definition of “balance.

5. THE ANNUAL TARGET LIST: Now take your dream list and place them into each of the next 1 to 10 years. You may be more specific about each of the next three years and then group the rest in broader time periods (i.e. 1 year, 3 to 5 years, 5 to 10 years, 10 years or more). Within each year or time period, rank the goals by blending your ratings for “personal payoff” and “do-ability.” You now will have an over all look at what you desire to do have and become. You have a Strategic Plan for your life. One that should reflect your inner desires and your possibilities. Be sure to write these goals down and read them frequently. It will thereby activate your sub-conscious mind, your natural energy and your deepest creativity to begin working toward them. It is important to trust that this process will work. Human history gives incredible testimony to the fact that it does.

6. THE 2020 ACTION PLAN: With this ground work done, you can now focus on the present and near future. Turn your dream list items into specific goals or targets for 2020. What financial income, what education, what specific use of time, what travel, what health or recreation activities, what self expression, what purchases, etc. You may break some of the goals down into shorter time periods, such as quarters, months or weeks. Under each goal, begin to write your thoughts and ideas for how you will achieve it. This is strategic thinking. What will it take? What can I do first? What do I need to research or learn about? What are the obstacles I must overcome? This is the part of personal (an organizational) planning that takes the most work. It is the part that improves the most as one begins to master the skill. Don’t worry so much about how well you do this. Following the first five steps of this process will

make the greatest difference. The more you do the action planning, the easier it will be, the more creativity you will display and the more confidence you will feel.

7. THE WEEKLY/MONTHLY/QUARTERLY REVIEW: Once the Dream List, Annual Target List and 2020 Action Plan are in writing, it becomes important to review them regularly. How often is up to you. Current year goals are reviewed at least weekly. The Dream List and Annual Targets should be reviewed quarterly and at least annually. They are dynamic documents. They will change as your life moves on. You will remove some items and add many others. Some items will change in their importance to you or in your estimate of when they might be achieved. The key to personal achievement is to stay with the process for the rest of your life. It is not meant to drive you or push you in any outside way. It is simply a “right system” for you to express your true desires, sort through them, make personal decisions and achieve personal satisfaction. In life, in business and in sports, the winners are usually the ones who have a better “game plan.”

LIFE IS SHORT, PLAY HARD

Dare to dream...dare to risk...DARE TO BE YOU!

TWELVE CHARACTERISTICS OF TOUGH-MINDED OPTIMISTS

- 1. Optimists are seldom surprised by trouble.**
- 2. Optimists look for partial solutions.**
- 3. Optimists believe they have control over their future.**
- 4. Optimists allow for regular renewal.**
- 5. Optimists interrupt their negative trains of thought.**
- 6. Optimists heighten their powers of appreciation.**
- 7. Optimists use their imaginations to rehearse success.**
- 8. Optimists are cheerful even when they can't be happy.**
- 9. Optimists believe they have an almost unlimited capacity for stretching.**
- 10. Optimists build lots of love into their lives.**
- 11. Optimists like to swap good news.**
- 12. Optimists accept what cannot be changed.**