BUILDING CHAMPIONS™

LIFE PLAN REVIEW AND REWRITE

BUILDING CHAMPIONS™

COACHING BUSINESS AND LIFE | ON PURPOSE

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INTRODUCTION

Creating your Life Plan was an important step toward being intentionally designing the life you want rather than being pulled along by The Drift. But your Life Plan was never meant to be a static document that you created once and then filed away.

In addition to your regular reviews, from time to time it pays to invest the effort to re-think, re-evaluate and even re-write your Life Plan. Seasons change, and your Life Plan needs to change and evolve with them. This tool is meant to give you the structure and process to do just that.

To get the most out of this exercise, pause, reflect and evaluate each of these steps carefully. Don't just go through the motions but look at this process and your Life Plan with a fresh perspective.

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YEAR IN REVIEW

The first step in reviewing and updating your Life Plan is to look back at the previous year. While you never want to cling to the past too tightly, it can teach you valuable lessons about what worked well and where you may have missed the mark.

By conducting a thorough review, you can identify the key habits, disciplines and activities you want to carry into the year ahead and which ones you need to leave behind.

As you answer the following questions, reflect back on the previous 12 months.

> **If you don't design your own life plan, chances are you'll fall into someone else's plan. And guess what they have planned for you? Not much.**
>
> **Jim Rohn**

ONE

Describe the year in 5 words or less.

TWO

What went really well?

THREE

What didn't go as well as you would have liked?

FOUR

What single accomplishment are you most proud of?

FIVE

What was your favorite memory or moment?

SIX

What (or who) are you thankful for?

SEVEN

What was the biggest lesson you learned?

EIGHT

What surprised you the most?

NINE

Who were the 5 people you most enjoyed spending time with?

TEN

What was the biggest problem you solved?

ELEVEN

What one thing would you do differently, and why?

TWELVE

Think about your big wins, highlights and happiest moments of the past year. Do you see any patterns in terms of people, activities or habits that you want more of in the year ahead?

THIRTEEN

Think about your biggest challenges, struggles or setbacks last year. Do you see any patterns in terms of people, activities or habits that you want less of in your life next year?

ACCOUNT REVIEW

When you first created your Life Plan, you identified the areas of your life that were most important to you. We called each of these areas your "accounts." These were the areas where you were going to intentionally invest your time and energy in order to increase your net worth in each account.

In addition to doing the general review on the previous pages, now it's time to do a deep dive and look back at each of your accounts one by one. As you review each account, think about the past year and honestly evaluate how you did in each area along with the corresponding commitments.

There are six questions for you to complete for each account.

Take Our Online Life Account Review Assessment

In addition, we've also created an online tool to help you assess both your progress and passion in the nine most common Life Plan Accounts.

www.LivingForwardAssessment.com

ONE

Account No. 1

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 2

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 3

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 4

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 5

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 6

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 7

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 8

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 9

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

ONE

Account No. 10

TWO

How would you rate the overall health of this Account over the past year?

1 2 3 4 5 6 7 8 9 10

THREE

Why did you rate it this way?

FOUR

What was your biggest win in this Account?

FIVE

What was your biggest challenge in this Account?

SIX

Were there any big changes or developments in this Account last year that would affect what you do moving forward?

SEVEN

What is your greatest opportunity in this Account in the year ahead?

REVIEWING YOUR LIFE PLAN

Now that you've reviewed your past year and how you did in each account, it's time to review your Life Plan itself. While you've probably made changes and edits to your Life Plan over the past year, this is your opportunity to pull back and evaluate the process as a whole. By investing the time, energy and effort now, you can re-adjust and re-calibrate to head into the coming year with renewed focus, energy, purpose and direction.

Before you begin walking through each section, make sure you have a current copy of your Life Plan (either electronic or hard copy), along with the ability to record any changes or edits you make. The goal is to walk away today with a revised Life Plan that will carry you forward with greater clarity and conviction into the year ahead.

EULOGY

- Read your eulogy.
- If you were to die today, would you make any changes to it?
- If you answered yes, take the time to re-write your Eulogy keeping the following in mind:
  - Does it reflect where you are now in your life? (people, priorities)
  - Remember the original intent: how do you think you would be remembered by those in your life if you died today?
  - Pay special attention to those who would be seated in the first rows at your funeral. Those are the people who would most feel your passing. What would they say about your life and your impact?

LEGACY STATEMENTS

- Read your Legacy Statements.
- Consider if you need to make any adjustments to them. Remember the intent of Legacy Statements: how do you want to be remembered by these groups of people when you die someday?
- Are there any groups you need to remove from your list?
- Are there any groups that are important enough to add? If so, write Legacy Statements for those groups now.

Remembering that I'll be dead soon is the most important tool I've ever encountered to help me make the big choices in life.

Almost everything - all external expectations, all pride, all fear of embarrassment or failure - these things just fall away in the face of death, leaving only what is truly important.

Steve Jobs

- **NOTE:** Work through the next five components for each of your accounts (Purpose, Vision, Inspiring Quote, Current Reality and Specific Commitments).

PURPOSE

- Review your purpose and ask yourself the following questions:
  - Is my purpose clear and compelling?
  - Does it truly speak to who I am and the unique role that only I can play in this area?

VISION

- Your vision has to be powerful enough to pull you forward and excite you about investing time and energy into this area.
- Review your vision and ask yourself the following questions:
  - Does my vision for this account truly inspire me?
  - Is it clearly written in a way that I can see it?

INSPIRING QUOTE

- Is there a quote, verse, saying or proverb that would help connect you with this account?
- This can be a great way to keep you motivated and excited about this account, especially when things get difficult.
- If you already have an inspiring quote for this account, make sure it still resonates with you. Consider updating it if it feels stale or uninspired.

The greatest danger for most of us is not that our aim is too high and we miss it, but that it is too low and we reach it.

Michelangelo

CURRENT REALITY

- Review your current reality section and ask yourself:
  - Does this section reflect where I am today?
  - Has anything changed?
- If you answered yes, revise this section to best represent where you are now.
- If you've seen progress, take a moment to acknowledge and congratulate yourself.
- If you haven't come as far as you would have liked, don't dwell on what was. Be honest about where you are and get excited about what could be.

When evaluating your current reality, don't rely on your perspective alone. Be sure to seek out feedback and insight from others, especially those closest to that particular account. Their input can help paint a more complete picture and possibly reveal some blind spots you may have.

SPECIFIC COMMITMENTS

- As you review your commitments, work through a Keep, Start, Stop process to assess them. Remember to be as specific as you can in this section.
  - Keep: which commitments worked really well last year that you should keep doing?
  - Start: are there any new commitments you should add that would help you add even more value to this account?
  - Stop: are there any commitments that you should remove from your list? Sometimes less is more, so don't be afraid to remove some commitments that may not have worked as well or just aren't adding enough value.

MOVING FORWARD

Congratulations on investing the time to review and revise your Life Plan. Life Planning is less about a process or a destination and more about a journey. Each little decision you make will add up to tell the story of your life. By keeping your Life Plan fresh and front-of-mind, you'll put yourself in position to make the best decisions so you can tell the greatest possible story with your life.

Here a couple of tips to remember as you live your Life Plan:

- Calendar Your Commitments: Put the commitments you made right into your calendar. If you can't enter them into your planner, spend more time to make sure they are quantifiable and measurable.
- Review Regularly: Read your plan weekly to keep you focused and on track. Sunday evening or Monday morning is suggested.
- Accept Accountability: Find a friend, family member or coach who will hold you accountable in these areas so you can reach the goals you set for yourself.