



## **Create a Life Plan and Life Dashboard**

There are lots of opportunities and options in life for most people. Some seem wonderful and full of promise, while others appear likely to lead to disaster. Not all are so clearly identified. This simple worksheet can form the basis of a continuous, 360° environmental scan. That, in turn, can help you discover the baseline data, to form your personal "Life Dashboard."

Running opportunities, such as starting a new business, up against this "life plan," can help keep you focused on achieving your goals. It can also help prevent you from being sidetracked by impulse or life's minutia, which might otherwise cloud the shortest or most efficient path to your real life goals.

Get a three ring binder. Fill out version #1, including the date, and clip it in the binder. Calendar it for 30 days, the end of the quarter, or semi-annually, but no less than annually (perhaps on the day after New Years, when many people traditionally reflect upon the events of the last year and the prospects for the next one, including New Year's resolutions.) When your calendar says it is time to review and update the Life Plan worksheet, review the accuracy of the "current status" and "ideal life" segments. Then review the "key move" action items, and adjust them to stay on track with your life goals. Calendar your "key moves," as you would in any project management situation. When you finish version #2, put it in the binder in front of version #1.

Repeat.

This "project" is your life.

There will be a quiz at the end!

## MY LIFE PLAN

My current status on \_\_/\_\_/\_\_\_\_:

Quality rating of my life on a scale of 1-100, with 100 being best \_\_\_\_\_

Realities of my life - responsibilities, funds available, expenses

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Things that make me happy

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Things that make me unhappy

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### My ideal life:

My loves: what I really like doing

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My skills & capabilities: what I do well

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My track record: what I have experience doing

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My ideal work style

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My manifesto

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(Outline your personal mission and your values in this section, and wrap this into a statement no longer than one page. This statement of purpose and what drives you should encompass all of the information you've outlined in the previous sections.)

**Key moves to get me where I want to go:**  
Time table

Action Item	start	Complete by:
1. _____.	_/_/___	_/_/___
2. _____.	_/_/___	_/_/___
3. _____.	_/_/___	_/_/___
4. _____.	_/_/___	_/_/___
5. _____.	_/_/___	_/_/___
6. _____.	_/_/___	_/_/___
7. _____.	_/_/___	_/_/___