



Annual Planning Event

4th January 2021

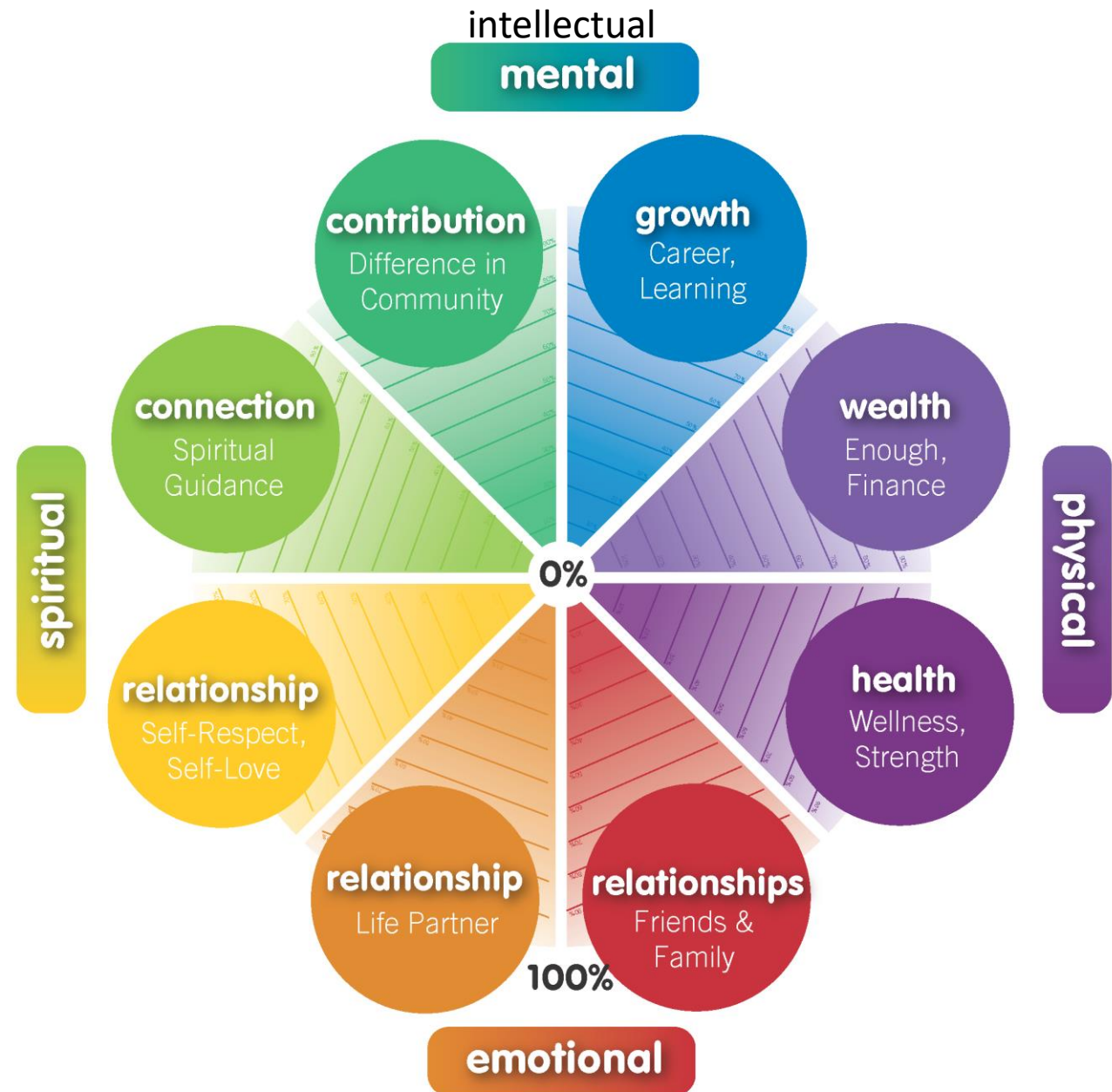
Agenda

- Setting a Plan for the Year
- Wheel of Life Current Assessment
- Envision Your Future
- Specific Goals By Category
- Priorities for Next 90 days

Importance of
Goal Setting –
Brian Tracy

1. Goals Give You Focus
2. Goals Help You Measure Progress
3. Goals Help You Stay Motivated
4. Goals Help You Beat Procrastination
5. Goals Keep You Wanting More
6. Goals Determine What You Want in Life

Wheel of Life



INTELLECTUAL : Career / Learning

- How satisfied are you with your job and career?
- Is it the job that you had imagined?
- Does your work bring you happiness and satisfaction?
- Do you earn enough for a living?
- What have you learnt over the past year?
- What hobbies did you start or deepen?
- How satisfied on a score of 1-10 are you in terms of your GROWTH?

INTELLECTUAL – 'Contribution'

- Do you help others?
- Do you volunteer?
- To what extent are you active at (sports) clubs, in the neighborhood or taking care of family members?
- What contribution are you making outside of your day to day roles and responsibilities both at work and at home?
- How fulfilled are you in these additional roles?

PHYSICAL – Wealth & Finances

- Are all incomes enough to meet household needs?
- Do you have any debts or loans or credit card concerns?
- What about savings and investments?
- What long term financial provision do you have in place?
- On a scale of 1-10, how satisfied are you with your current financial status?

PHYSICAL – Health, Nutrition & Fitness

- How physically and mentally healthy are you?
- How do you feel?
- Are you satisfied with your appearance and weight?
- Do you have any physical discomforts?
- To what extent are you engaged in sports?
- How much exercise are you doing every week?
- What about nutrition and hydration? How satisfied are you with your eating plan?
- On a scale of 1-10 how satisfied are you with your health, nutrition and fitness?



EMOTIONAL – Relationships with Friends & Family

- Are friends supportive, unconditional and trustworthy?
- Can friendships be built upon and friends always be counted on?
- To what extent do you spend your free time with family and friends?
- How do you feel about balancing work and family life?
- On a scale of 1-10, how satisfied are you with your relationship to friends and family?



EMOTIONAL – Relationship to Life Partner

- Have you found happiness in love?
- How do you feel about your relationship?
- Does it bring you passion and joy?
- Is your partner your soul mate?
- How regularly do you have date nights?
- On a scale of 1-10, rate how satisfied you are with your relationship to your life partner

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SPIRITUAL – Relationship to Self

- How much do you love yourself?
- How happy are you inside?
- How much free time do you spend just with you?
- What about other enriching hobbies? What do you do to deepen your self care and sense of flow?
- What about fun and adventure? How much of this are you bringing into your life?
- On a scale of 1-10, measure how much do you value and love yourself.

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SPIRITUAL — Spiritual Guidance & Personal Development

- How do you deal with personal growth?
- Are you open to new experiences and eager to learn?
- How much are you focused on using your creative gifts?
- Are you spiritually connected to both the inner and outer worlds?
- What activities do you do to connect back to your inner world?
- On a scale of 1-10, rate how satisfied you are with your spiritual growth.

Assessment

Category	Score Today
Intellectual – Career and Learning	
Intellectual – Contribution	
Physical – Wealth & Finance	
Physical – Health and Well-Being	
Emotional – Relationship to Friends and Family	
Emotional – Relationship to Life Partner	
Spiritual – Relationship to Self	
Spiritual - Relationship to Spiritual Guidance	

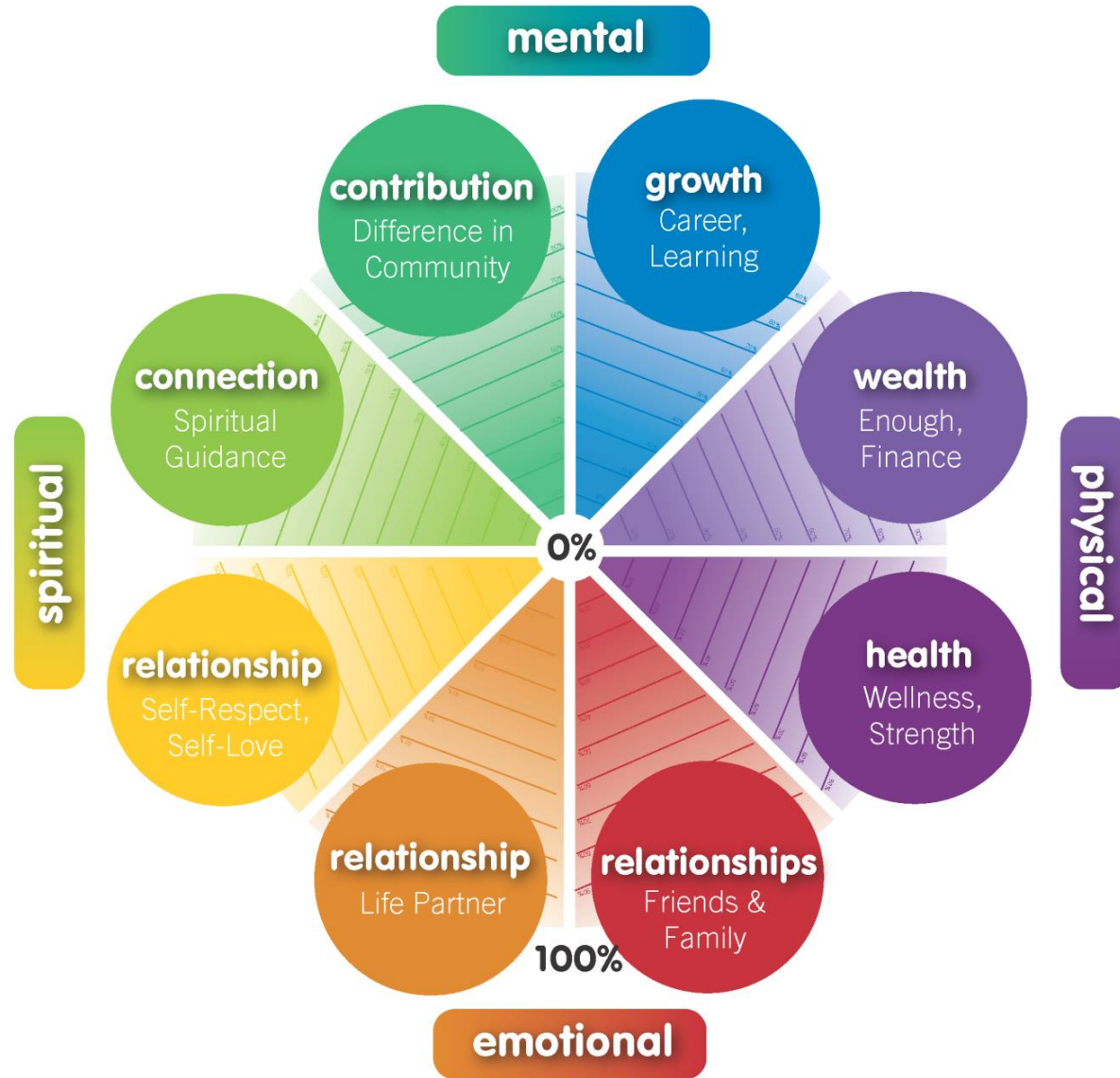


Bringing in the Feminine

Our heart, imagination, intuition and individual spirit.

- Why is the goal important?
- How does it fit with our values?
- How do we want to feel as a result of achieving the goal?
- How will it serve our bigger purpose?
- How much is this a desire v a want?

Let's start with a visioning exercise



INTELLECTUAL :
Career / Learning

Ideal Score for 2021

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INTELLECTUAL : Career / Learning

Attend more networking events and make new contacts.

Achieve a promotion to _____ position.

Get a pay raise.

Agree to take on new responsibilities.

Develop meaningful relationships with your coworkers and clients.

Ask for feedback on a regular basis.

Learn how to say, “No,” when you are asked to take on too much.

Delegate tasks that you no longer need to be responsible for.

Strive to be in a leadership role in ____ number of years.

Get a Mentor

Attend the WLA’s Career Bootcamp!

INTELLECTUAL : Career / Learning

- | | |
|---------------|----------------------|
| 1. Cooking | 11. Gardening |
| 2. Hiking | 12. Knitting |
| 3. Painting | 13. Sewing |
| 4. Sculpture | 14. Drama |
| 5. Writing | 15. Singing |
| 6. Running | 16. Photography |
| 7. Dancing | 17. Learn a Language |
| 8. Yoga | 18. Flower Arranging |
| 9. Meditating | 19. Gym |
| 10. Reading | 20. Woodwork |

INTELLECTUAL :
Community
Contribution


Ideal Score for 2021
=

INTELLECTUAL : Community Contribution

Ideal Score for 2021

=

- Setting up a Collection Project
- Teaching / Coaching / Helping with Community Groups
- Fixing Things in the Community
- Hosting Charitable Events
- Making Things for Charities
- Volunteering Your Time
- Raising Money through Physical Challenge



What are your
Top Three
'Community
Contribution'
Goals?

By January 2022 I intend to achieve the following goals:

- 1.
- 2.
- 3.


PHYSICAL: Wealth & Finances

Ideal Score
2021 =

PHYSICAL: Wealth & Finances

Ideal Score
2021 =

- Create a Monthly Spending / Budget and Stick to it
- Record every penny you spend
- Pay off debt
- Save up an Emergency Fund
- Saving for Retirement
- Speak with a Financial Adviser & Create a Long Term Financial Plan
- Write a Will
- Build a second source of income
- Review all Insurances
- Create a Giving Pot
- Review Savings



What are your
Top Three
'Wealth &
Finance' Goals?

By January 2022 I intend to achieve the following goals:

- 1.
- 2.
- 3.


PHYSICAL: Health & Nutrition

Ideal Score
2021 =

PHYSICAL: Health & Nutrition

Ideal Score
2021 =

- Walk for 30mins a day / 10000 steps
- Have greens on every plate
- Inhale Fresh Air 15mins every day
- Devote 20mins a day to exercise / stretching
- Drink at least 4 pints of water a day
- Prep healthy lunches the night before
- Include 50% fruit / vegetables with each meal
- Start Your Day with a Healthy Breakfast
- Go Vegetarian One Day A week
- Don't eat when you are full!
- Work with a nutritionist
- Work with a personal trainer



What are your
Top Three
'Health &
Nutrition' Goals?

By January 2022 I intend to achieve the following goals:

- 1.
- 2.
- 3.




EMOTIONAL – Relationships
with Friends & Family

Ideal Score 2021 =



EMOTIONAL – Relationships with Friends & Family

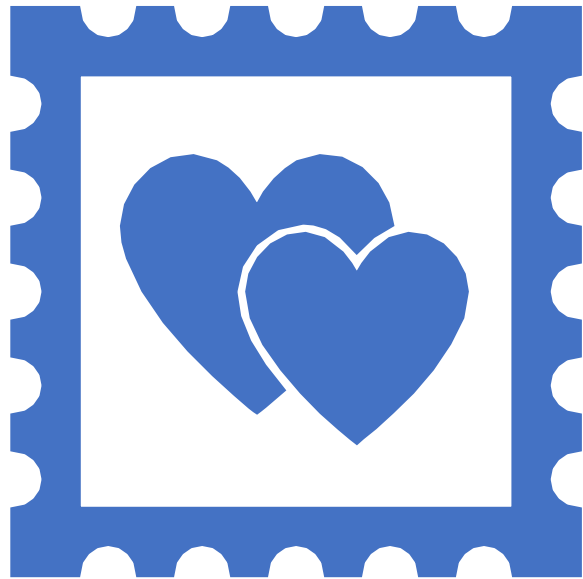
- Have meals together
- Planning and Saving for a family trip
- Family games night
- Going for regular walks
- Community Service Project together
- Have a family portrait done
- Organising the home / garden
- Family fun days
- Start a new family tradition
- Have a short break
- Regular catch ups



What are your
Top Three
'Family & Friend
Relationship'
Goals?

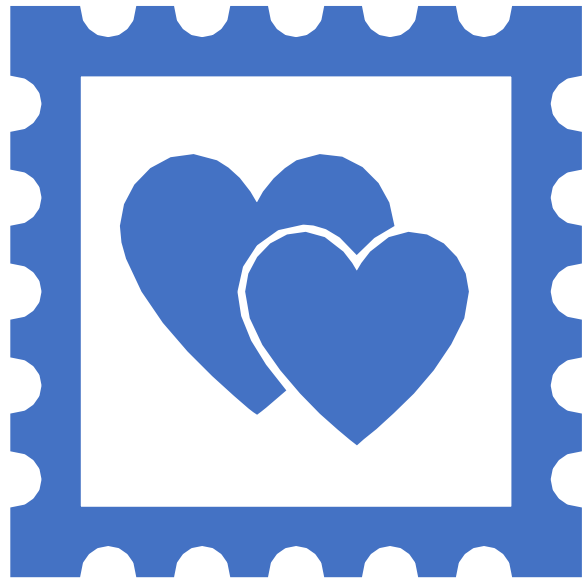
By January 2022 I intend to achieve the following goals:

- 1.
- 2.
- 3.




EMOTIONAL – Relationship
to Life Partner

Ideal Score 2021 =



EMOTIONAL – Relationship to Life Partner

- Weekly Date Nights
- Do challenges together
- Give each other space
- Do the Love Language Test
- Surprise each other
- Category 9
- Find ways to laugh more together
- Hold hands more...



What are your
'Life Partner'
Goals?

By January 2022 I intend to achieve the following goals:

- 1.
- 2.
- 3.

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SPIRITUAL – Relationship to Self

SPIRITUAL – Relationship to Self

Ideal Score 2021 =

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SPIRITUAL – Relationship to Self

(Self Love, Self Care,
etc)

- Set up a Self Care Sunday
- Lift weights
- Clear Clutter (regularly)
- Treat yourself to manicures, massages, bubble baths
- Take a walk every lunchtime
- Do something adventurous – push yourself out of your comfort zone
- Tell yourself you love yourself EVERY DAY
- Be proud and record your achievements every day and every week.
- Take a daily multi vitamin



What are your
'Self Love'
Goals?

By January 2022 I intend to achieve the following goals:

- 1.
- 2.
- 3.

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SPIRITUAL – Spiritual Guidance & Personal Development

SPIRITUAL GUIDANCE & PERSONAL
DEVELOPMENT

Ideal Score 2021 =

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SPIRITUAL — Spiritual Guidance & Personal Development

- Start listening to a regular and uplifting podcast
- Daily affirmations, gratitudes and journaling
- Start / deepen meditation
- Make a list of books to read each month
- Take regular walks in nature
- Set an intention to develop a specific aspect of your leadership
- Practice forgiveness and spend significantly less time with people who don't give you good energy
- Stop feeling guilty! Turn that energy into positive focus
- Practice daily kindness and Pay it Forward



What are your
'Spiritual
Guidance &
Personal
Development'
Goals?

By January 2022 I intend to achieve the following goals:

- 1.
- 2.
- 3.

Your 90 day Plan:

January 2021 – March 2021

Category	What do I hope to achieve by end March 2021	What do I need to put in place for end of March 2021
Career & Learning		
Community Contribution		
Wealth & Finances		
Health & Nutrition		
Family & Friends		
Life Partner		
Self Care		
Spiritual / Personal Development		



Your 90 day Accountability Buddy

Your Monthly Goals for January 2021.....
