

## GUIDE TO ACCOMPANY THE LIFE-PLANNING WORKBOOK

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The Life-Planning Workbook is a tool to help you live your life by choice instead of chance. Trying to keep up with the daily demands of life can make it difficult to step back and take a look at just what's going on, how it's working for you, and how you can direct your life in the way you want it to go. The life-planning process will help you do that kind of assessment in an efficient, effective way. It allows you to organize a lot of information about your life so you can systematically plan for the future.

This guide is designed to support your getting the best possible benefit by providing some additional information beyond the instructions included in the book itself. Feel free to use this guide in whatever way works best for you. You can read it all at once (to get an overview of the entire process) or you can read it in sections. If you do decide to use it as you progress through the book, you might start by reading the opening comments and the information about Part I before working on Part I; then read the information about Parts II, III, and IV just prior to working on each of those sections.

Working with this material can be a significant experience because it asks you to honestly address some of the questions that are at the very core of life.

- **Are you finding meaning in your current lifestyle?**
- **Are you satisfied with your important relationships?**
- **Are you content with the way you use your time?**
- **Are you consciously balancing the demands in your life?**
- **Do you often wonder who's in charge of your life?**

This book helps answer these questions by helping you:

- **Take stock of where you are**
- **Decide what's really important, and**
- **Make plans to create the life you want.**

This is not just another book to read and then put away. It's a *workbook*, so it will reflect your own particular life circumstances. It can be a great tool in living a more satisfying life, regardless of your current situation. And it can be a lifeline if you are frustrated or disillusioned about the way things are going.

*Lifeplanning is not a single event; it's a process* you can use to get a clearer understanding of the key aspects of your life on an ongoing basis. We began developing this material over 40 years ago, calling it "life/work planning" and using it to help people do career planning in the context of their lives as a whole. The current version includes insights we've gained from years of working with people in seminars and workshops.

Before you begin your own work with The Life-Planning Workbook, we'd like to give you a little overview of how it's laid out and how you can get the most from it. While we have refined and made changes in this material through the years, the philosophy has remained the same—and that's what's really important. It's not that any one particular page has the ultimate answer for you. This is really a process that you can continue throughout your life, helping you in an ongoing way to constantly revise and update your decisions based on who you are and what you want on a current basis.

The workbook is divided into four parts, actually presented as four primary questions:

- **Where Have You Been?**
- **Where Are You Now?**
- **Where Do You Want to Go?**
- **How Do You Plan to Get There?**

At this point, we want to go through each of the four parts to give you a better sense of what each one contains and discuss the goals of each part and how you can get the most benefit from doing this work.

Before beginning Part I, be sure to read through the Introduction. It gives you some specific information about how to use the workbook and encourages you to adopt a frame of mind conducive to doing the work.

You may notice that the last page of the Introduction addresses the issue of using this workbook with your partner. If you choose to do that, you will gain the most if you work through an activity independently and then share your individual work with each other.

You are about to embark on one of the most exciting adventures of your life. Have fun and have at it.

## **PART I: WHERE HAVE YOU BEEN?**

While we don't want to dwell on the past, it's important to *start* by looking at the past as a way of looking to the future. If you don't know where you've been, it's hard to figure out where you're going. It's like trying to give someone directions to a certain place without knowing where they're starting from.

The goal of Part I is to do a Life Review, to provide an overview of what has happened in your life to this point. This is a key piece to the process of putting your life in perspective, giving you a better idea of who you are as a consequence of where you've been.

The first written activity is on page 15—a **Life Expectancy Questionnaire**. Your responses to these lifestyle questions will give you a realistic sense of your life expectancy—and therefore a realistic *potential* date of death. (Obviously, you're not held to that date—but it does bring a degree of realism into your view of where you stand in your life at the present time.)

Once you've established your life expectancy, read through the detailed guidelines for filling out the **Life Review**. Then turn to the Life-Planning Worksheet on pages 18 and 19 to do the actual work. The first order of business is to use the information from your life expectancy questionnaire to draw a line from the center of the circle to the point on the perimeter that represents what proportion of your life you have already lived and how much is left—so you graphically see how much of your life is ahead of you—how much to plan for. Naturally, none of us knows just where we are in the scope of our life, but attitude does make a difference in what you see as possible.

The Life-Planning Worksheet is something you really need to spend some time with. It's aimed at helping you organize your thinking about your past by identifying the important events, people, values, decisions, and feelings in your life to this point.

It's important that you do *not* discount any ideas that come to mind, feeling that perhaps they're not really important and therefore don't warrant being written down. If something comes to mind, then it has some kind of significance for you personally, and you don't have to justify or defend just why it does or what the precise significance is. Just put down all those thoughts that come to mind as you reflect on the things that have happened in your life to this point. Remember, this is all in preparation for doing the kind of planning for the future that requires you to be realistic about where you are in the grand sweep of your life.

Following the Life-Planning Worksheet, you'll find a few more pages dealing with specific areas of your life that are key to getting a sense of where you've been.

First, there's the crucial **role of the family** in shaping your **values**. Page 21 will help you clarify what values you got from your family of origin. Sometimes we continue to live out values that were handed down in our family without consciously choosing those values for ourselves. This exercise can help you see what messages you got about these values that may be continuing to affect your life today.

While there's no specific writing to do about perception, pages 22 and 23 explain the differences in **perception** based on our individual *interpretation* of what has happened. Since we all see the world through our own set of rose-colored glasses, our view of what has happened to us is based on how we filter events through our own personal agenda to form reality as we know it.

In reviewing your life experiences up to this point, it's important to acknowledge both the good and the bad (**the highs and the lows**)—and the **turning points**. On pages 25 and 27, write down some of these significant events that have made a difference in your life.

The final task in looking at where you've been in Part I is to make a list on page 29 of your **achievements** to date. Don't be shy about writing down everything that comes to mind. You need to have an appreciation of your accomplishments (both large and small) because of the strength and confidence they can provide as you look ahead.

So this opening section on "Where you've been" is really just background—to prepare you for the work of getting a good understanding of where you are *now*. Which brings us to Part II.

## PART II: WHERE ARE YOU NOW?

This is the biggest section of the book because getting a clear picture of where you are now requires that you take a lot of snapshots. Regardless of how well you already know yourself, all of us can learn more if we can open up and be honest with ourselves while getting as many "takes" as possible on where we are now.

You may feel that some of this is repetitive; you may feel it's unnecessary; you may feel resistant to doing it. If there's a particular page that you feel some resistance to doing, it could be because that's the very one you need the most. So just look at this as a way of learning more about yourself, not judging yourself as to whether anything is "right" or "wrong."

In keeping with that spirit, we hope you'll approach this work with a positive attitude—and with a sense of lightness. Life is serious, of course, but the more lightness we can bring into even these serious deliberations, the clearer we're able to think. That's the reason that throughout the workbook we've included the appealing little character, Lifey, in the illustrations, as well as using quotes, many of which reflect the lighter side of life. You'll be ahead of the game if you can avoid getting bogged down in the potential seriousness of this undertaking.

This doesn't have to be unpleasant. It *is* work, and it is *hard* work. But it can be such satisfying and exciting work. So as you embark on Part II to get a clearer sense of Where You Are Now, be as honest as you can possibly be, writing down the first thing that comes to your mind. Try to avoid deliberating, rehearsing, rejecting or *planning* what to write, because that will keep you from getting down to the real core of what you can know about yourself.

So beginning on page 35, we're asking you to answer a lot of personal questions. Almost this entire section is framed in the form of questions, addressing a wide range of issues covering almost every aspect of your life. The first task on page 35 is to help you get a sense of just where your head is: whether you're primarily thinking about the **past**—or whether you're focused more on the **present**—or whether your thoughts tend to be looking at the **future**.

Then on page 37 we're asking you to reflect on **what's going on now** in your life with a whole range of issues like time and people and places and things and ideas and information, and your sense of yourself, with your responsibilities, your activities, your body, your spiritual life. While you don't need to write answers to each of the thought-provoking questions on page 37, it will definitely be helpful if you acknowledge whatever thoughts come to mind as you read those questions.

Now something that does require a little more work is the process of getting a sense of **what's changing** in your life. On page 39, we're asking you to look at the various areas of your life to determine whether the change that's taking place is positive or negative and whether the amount

of change is just a little bit or a lot. Because whether or not we make deliberate changes, there are always going to be changes that are imposed on us throughout our lives that are not of our choosing. So we need to be able to stay on top of those as well and manage them in the best way possible.

Of course, our ability to manage our lives depends a great deal on our sense of ourselves, so on page 41 we're asking you to focus on your **self-image**. Since your view of who you are and what you can do affects everything about your life, it's important to expand your sense of yourself beyond the kind of narrow view most of us hold of ourselves. Many of the activities in this section of the book are aimed at expanding and clarifying your perception of yourself.

Another difficulty that most of us have in arranging our lives is trying to coordinate the many different roles we play. Most of us play a variety of roles at any given point, as well as shifting into drastically different roles at different stages of our lives. So page 43 asks you to look at the various **roles you play** and think in terms of how much of your time and energy is devoted to those roles and which ones are providing you with more satisfaction or more frustration. This would no doubt change from day to day, but at this particular moment you can get some clearer sense of just what roles are draining you the most and what roles are giving you the most benefit.

Then we have a questionnaire that takes another approach to assessing your current **quality of life**—where you answer questions about the degree of change that you need to make in various areas of your life. It's not as if you necessarily need to make changes in all areas; you're no doubt doing some things very well, and we want to reinforce that and build on it. So page 45 will help clarify where you're doing great and where you need to put more effort, specifically focusing on your health, your relationships, your mind and spirit, your sense of fulfillment, and the degree of balance you feel you have in your life.

Next, we have a couple of pages addressing the issue of motivation, again not necessarily writing down a lot of things, but trying to do some reflecting that can raise your awareness of just **what motivates you**.

An important area, of course, is work—the degree of satisfaction that you find in your job. In fact, when we first began working with this material, we saw it primarily as career planning, but doing it in the context of your life as a whole—recognizing that it's frequently short-sighted to design your life totally around your job without considering all the other aspects of your life that are also important. But through the years we have significantly diminished the emphasis on career. While work is a central aspect of many people's lives, it's still only one aspect among many. And, in fact, when people come to the end of their lives, most of them see that their commitment of time and energy to their job has crowded out other aspects of life that they now see as more important.

So on page 51 we've provided a place for you to do some analysis of your satisfaction with your current job situation in a number of areas. Then we're asking you, on page 53, to turn your attention to the **interaction between your work and home life**. How does your job fit into your life as a whole? For most of us, our work has both a positive and a negative impact on our home life. And conversely, our home life has both a positive and a negative impact on our work. So understanding those dynamics can help you better balance the two—which is the aim of this particular piece.

Then on page 55, there's an opportunity for you to look at all the various priorities in your life, work being only one, so that you can see how you're balancing not just your home and work, but balancing all aspects of your life. Each spoke can represent some particular aspect and you'll be able to see as you label the spokes that they are sometimes in conflict, and it does create a lot of difficulty in maintaining good balance. But **balancing your priorities** is a significant part of getting control of your life.

The next area that we're looking at on page 57 is your **use of time and energy**. This is just a little refinement of the issue of balance by letting you focus on just how low or high your investment of time and energy is in the various areas of your life.

Of course, no matter what our priorities or demands in life, we can only be fully present for one thing at a time. The model on page 59 provides a way to think about how we choose which of our many awarenesses to focus on. So the real question, after getting the broader picture of your overall situation is to figure out **what's the best use of your time right now**, at any given moment, and how to be more conscious and more aware and more mindful of what choices you're making and what you're doing with your life.

To back away a little bit now from being so precise and to dig back down inside and see what other ideas you can uncover, we're asking you to complete the sentences on page 61, which are just **some private reflections** to make about your life.

The next area that we want you to think about is a real core issue in that it affects all other aspects of your life; that is your values. We're calling this "**Why Worry about Values?**" And the answer is because that's where the meaning in life is. What you value defines who you are and what you will become. Now a lot of us think we know what our values are, but all too often they're simply the ideas that were passed down to us from our parents that we may or may not have really bought into and owned as our own. So on page 65, we've included a form that will help you see first of all, how important you *say* you believe a certain value to be and then the degree to which your actions reflect this value.

Obviously, there's a lot to learn from whatever disparity exists between what you *say* is important to you and what you *do*. So this covers a great many areas of life and should be able to help you bring some clearer focus to what your own real values are by virtue of the way you live.

Now our **feelings** are very closely related to our values, and page 67 takes a look at that, asking you to reflect on recent times when you've had specific feelings—both positive and negative. There's usually a lot to learn from whatever it is in our lives that evokes a strong emotional response.

Then to continue the focus on values (since this *is* such an important area), page 69 is aimed at taking another snapshot of how you see your values. Besides learning many of our values from our parents, we also take on a lot of values by virtue of significant events in our own lives. So by listing some of the **significant events** that you've experienced, you can then reflect on what you learned from that experience. What kind of values did you take from each significant event? Sometimes we learn very positive values. At other times we adopt values that lead to being cynical or suspicious or anxious. So it's important to discover what values you may have acquired based on your own personal experiences.

As you do this work, it's important to realize that the learning you got from some particular experience is not necessarily the same learning that someone else would have gotten from the same experience. If you reflect on the Perception model that we used earlier in the book, on page 23, you can see that what you learn is based on your *interpretation* of your experiences, not the experiences per se, because two people can have similar experiences but come away with very different conclusions about what it means for their lives.

Page 71 contains what we call a **Worst First Ranking**. This is a difficult activity for most of us because each of the 5 items listed seems pretty bad. But the idea is to determine how you personally rank these items, ranking the worst first—in other words, whichever is the worst in your mind is the one you would rank # 1. Take time to do your own personal ranking before continuing.

The real significance of this activity is not just in determining what you think is worst, but in learning what it tells you about yourself and your values. Having used this material with hundreds of people during the past 30 years, we've seen that overwhelmingly people rank "losing your eyesight" as the worst. And yet in reality, people in general do not seem to react to that event as if it were the worst. Ironically, where most people don't cope so well is with an item that is seldom ranked as the worst: that's "undergoing bankruptcy." Since bankruptcy has become more and more common in recent years, one might think that perhaps it has lost its power to be seen as a terribly bad experience. However, when you look at the reactions of some people to financial ruin, you occasionally find that people in that situation commit suicide. And at the same time, it's almost unheard of for a person who loses their eyesight to commit suicide.

This seems to be an unexplainable phenomenon until you put it in the context of your self-image and your self-esteem. The most likely explanation for why some who fail financially commit suicide while those whose eyesight fails do not, is because those with the financial problem feel it's somehow their fault—whereas those who lose their eyesight feel that it's no fault of their own.

At the bottom of page 71, you are asked to reflect on the relative significance to you of events that happen through no fault of your own vs. those for which you feel personally responsible, like you somehow failed.

The reason for going into so much detail on this point is to illustrate how it's not enough to superficially respond to the various questions throughout this book without doing the deeper thinking behind your responses that says *Why?* And that *Why* is something only you can ask and answer for yourself. This deeper questioning will allow you to get the most benefit from this work.

The last few pages of Part II ask you to shift into a more positive framework and answer the questions: **What means the most to you? What do you like to do? and What are you good at?** So pages 73,75 and 77 are aimed at looking at your strengths, your happiness, your satisfaction, your power—because that's the source of what will be needed to translate your new awareness of where you are now into the work you'll be doing in the next section on figuring out where you want to go.

### PART III: WHERE DO YOU WANT TO GO?

Most people want to *start* with this question, but you're only prepared to realistically focus on it *after* you've gotten a handle on where you are now.

Actually, most of us carry around in our heads some kind of image, a fantasy, about where we would like our future to take us. But frequently, it doesn't get beyond being just a fantasy, or a daydream, or a vision. The best hope for translating your desires into reality is to systematically consider all the multitude of issues that affect your lifestyle.

So on page 82 we have a **Lifestyle Checklist** that lists many items to consider under a number of major areas, including the material, the intellectual, the professional, the physical, the social, the spiritual, the emotional, and other large life issues. As you read over these lists, notice which items stand out as significant ones to you personally at this stage of your life.

Then on page 83, begin the process of **choosing** the most important ones to focus on in more depth by making some notes as to where you are and where you want to go on your major issues. (This will be useful later when you begin doing some goal-setting.)

You may notice that some of your preferences for the future are in conflict with each other. Perhaps this has been a stumbling block to your taking some actions you've been inclined to take. **Facing up to the conflicts** in your vision for your potential future may help you **clarify the choices you need to make** and take action on them now.

Since different aspects of life take precedence at different points in life, most of us feel a need for whatever seems to be lacking at the moment. So there's no such thing as figuring out how all these things fit together once and for all; it's a constantly shifting scene—and is one of the reasons that it's so important to do this kind of work on an ongoing basis.

After doing this kind of detailed thinking, it's good to shift back to doing some **reflecting**. So on page 85 we're asking you to complete some sentences that if you do it spontaneously (without thinking or censoring) can tell you "**all you need to know**."

Page 87 contains a wonderful reflection called "**If I Could Live It Over**," written by an 85-year old woman. Reading this should help you think about the broad sweep of your life—which should help prepare you for the next exercise—which can be somewhat disturbing (but which can also be a very positive experience if you're able to take it that way)—that is, to be very realistic about your own death. Dying is not our problem; our problem is *living* until we die. So there's no reason to shy away from thinking about our own death—because that kind of thinking can help us choose to *live* better.

So on page 89, you're asked to **write your own obituary**—twice: once as if you died right now and a second time as it might appear if you live out your normal life expectancy (based on

the life expectancy questionnaire you filled out at the beginning of the workbook). Then, if you compare those two, and note what was included in the second obituary that was missing from the first, you'll have a good idea of what you might feel is lacking in your life. And you might start to think of what steps you could take to make it more likely that you could have those experiences. (This thinking will also provide you with ideas you may use when you do some goal-setting.)

It's important to go ahead and take charge of the course of your life before it's too late. Unfortunately, all too often, we wait until there's either some major illness or accident or until we're very old. And then we look back and think, Oh my goodness, *I wish...* or *if only...*

Page 91 presents you an opportunity to do a kind of "**If only...**" thinking that can be of great benefit. If you just imagine that you have been told you have a terminal illness and have only a month to live, what would feel the most unfinished about your life? A good way of getting at that is to just complete the sentence, "if only..." If only I had... or If only I could. And whatever you identify as lacking provides insight as to what's really important to you—and therefore something you need to try to make happen.

This brings us to page 93 which we've called "**Making it Happen.**" Too often, we think things will change in our lives just by virtue of getting insight or understanding, but that's only the starting point. An essential preparation to taking action that can lead to real change is to go through this process of organizing your awarenesses.

As we've said before, change involves choice. (Remember, you can have *anything* you want, but not *everything* you want.) On page 95 we ask you to list **some choices you need to make** and mark where that choice stands on a continuum of easy to hard. A realistic assessment of the task is crucial to success.

We conclude Part III by having you do some **goal-setting** on page 97. Putting your goals in writing is a crucial part of this process. Be sure to include some short-range, medium-range and long-range goals. Translating your *ideas* of what you would like to have happen into *specific* goals significantly increases the probability that they will become reality.

## PART IV: HOW DO YOU PLAN TO GET THERE?

Once you've established some goals, all too often that's the end of the process and there's not a plan for how to reach those goals. So the final section helps you develop the plan that will lead you toward your goals. And that involves making sure you're armed with all the confidence you need to do that job.

So on page 103, we've asked you to pause to **reflect on your assets** in a number of areas, some of which you may not have considered. And on page 105, we want you to get a sense of what personal strengths you can bring to bear in increasing your own individual effectiveness. There's not just *one* way to succeed; there are many. And the people who succeed in living their lives in the most satisfying way are those who get in touch with their own unique strengths.

Finally, you're asked to get very realistic and do some specific planning—what we call "**doing a reality check**." This is where your sense of "things as they are" can begin to be translated into your idea of "things as they might be" by developing specific strategies and committing to specific actions that will move you toward your goals.

We've included three **Planning Worksheets**, on pages 107, 108, and 109, which will allow you to identify three different goals that you want to set for yourself. Now these can be short, medium, or long-range goals. (In fact, it would be a good idea to work with a variety of types of goals.) But it's also important to remember that your goals need to fit together. If your short-term goals aren't compatible with your long-term goals, this might create difficulties in reaching any of your goals.

If you spend a good bit of time being very precise in filling out the Planning Worksheets, your goals will be more reachable. Each of these points is crucial; you need **good clarity about your strategies and your action steps**, as well as clarity around **what kind of help you will need** from others. Then you need to establish guidelines for **monitoring your progress**—like how you'll know if you're progressing toward the goal, how you'll know when you've reached it, setting a date, and then identifying things that could block you from reaching your goal.

When we think of what blocks us from reaching our goals, we're likely to think in terms of outside forces; but one of the biggest drawbacks to reaching our goals, unfortunately, is ourselves. So on page 111 we ask you to take a look at **how you block yourself from reaching your goals**. Again, it's important to be honest with yourself so that you can be armed in advance with the awareness of the ways you might block your own goals, and thereby avoid doing that.

Then, the concluding piece to having this effort succeed is to plan **how to involve others** who can be a support for you. On page 113, **build a support system** that will help you move in the directions you have chosen. This is a very personal, individual process. Do not assume that

your partner or your family will *automatically* be a part of your support system. It's important to look at each person on an individual basis to determine the degree to which they can be allies in your effort to reach your goals. It's also important to become aware of those who might *interfere* with your reaching your goals. (And again, just a reminder that the goals need not be life-altering, overly significant goals—but whatever can make a difference in the quality of your life.)

The last page in the book is perhaps the most important one—page 115, "An Ending and a Beginning." While this is the end of this workbook, it's really only the beginning—because **Life Planning is an ongoing process**. So if you've gone through this process once thoroughly, that's not to say that you've "Planned Your Life." It's only a starting point for now.

Personally, we have a habit of going through this thought process at least once a year. We don't necessarily work through the entire book, and it's not even a completely separate activity. But we reflect on where we are and update our plans. This kind of activity eventually becomes integrated into your daily life and your daily thinking—these ways of checking and testing and reminding yourself of who you are and where you're going and whether or not you're moving toward your goals.

The process of life-planning can become *a way of being in the world*—a way of finding satisfaction and joy. There's a great deal of satisfaction in simply being in charge of your life. So that whatever decisions you make, however they turn out, ultimately you have the satisfaction of knowing that you're the one who made the decision. We hope and believe that this material can give you a better handle on your life plus give you a systematic way to manage your life on an ongoing basis.

In closing, try to remember Rule No. 6: Don't take yourself too seriously.