

APPENDIX 11: BLANK TEMPLATES TO CREATE YOUR LIFE BY DESIGN

Note: This book is also available in an audio format without the appendices. The appendices can be accessed on the websites www.jackdalysales.com and www.jackdalyslifebydesign.com.

STEP 1: BIG QUESTIONS:

1. What do I want in my life?

2. Why do I want it?

3. When do I want it by?

4. What do I choose to do in order to achieve it?

STEP 2: WHERE ARE YOU NOW?

HEALTH/FITNESS:

1. How would I rate my overall health on a scale of 1–10?

2. Am I taking care of myself, generally speaking?

3. How much time am I allotting each week to this area of my life?

4. Am I getting sufficient sleep?

5. Am I following a healthy eating plan?

6. What are some initial ideas to improve in this area?

FAMILY:

1. On a scale of 1–10, how do I rate my relationship with my spouse/significant other?

2. On a scale of 1–10, how do I rate my relationship with my children?

3. On a scale of 1–10, how do I rate my more distant family relationships?

4. What are the strengths in my relationship with my spouse/significant other?

5. What are the areas that can be improved with my spouse/significant other?

6. What are the strengths in my relationship with my children?

7. What are the areas that can be improved with my children?

FINANCIAL:

1. Do I have a financial plan for my family life?

2. Do I operate with a monthly budget?

3. Do I have an age for desired retirement?

4. Have I determined the amount of money needed for retirement?

5. Do I have specific income goals?

6. Do I have debt?

7. If in debt, do I have a plan to retire such debt?

8. Am I adequately insured? In what way?

LEISURE:

1. Do I have a desire to read? If so, how often?

2. Do I enjoy movies? If so, how often?

3. What are typical activities spent with the family?

4. What kind of vacations have I been taking?

5. Do I have a plan for vacations?

6. Do I have a bucket list? For myself? For family?

7. What about family meals together? Frequency?

8. What are the things I've done with leisure time that provided me the greatest satisfaction?

SPORT:

1. What sports do I enjoy as a spectator?

2. What sports do I enjoy participating in?

3. How often do I participate in desired sports?

4. What sports would I enjoy playing but have yet to carve the time out for?

SPIRITUAL:

1. On a scale of 1–10, how important is this area in my life?

2. On a scale of 1–10, how would I assess my participation here?

3. How would I describe my spiritual life today?

4. What could I improve upon in this area?

GROWTH:

1. On a scale of 1–10, how would I assess myself in this area?

2. What activities have I done in this area?

3. What activities would I like to see more of?

4. What percent of activity is tied to my profession?

5. What percent of activity is tied to my personal life?

BUSINESS/CAREER:

1. How would I categorize the time I have invested in my profession?

2. What businesses/roles have I worked in?

3. On a scale of 1–10, how would I rate my happiness in this area?

4. What would be needed to raise that happiness number?

5. Where is my passion when it comes to career?

6. What stands in the way of improvement here?

FRIENDS:

1. List the names of some old friends.

2. List the names of some new friends.

3. How often do I get together with these friends?

4. Are these get-togethers in person or over the phone?

5. Is this the desired mix of friends and frequency?

6. Do I feel I have too many or too few, or is the mix about right?

7. What could I change to improve this area of my life?

STEP 3: VALUES & TASKS

List twelve or more things you value most. Don't worry about the order or priority; at this stage it's about quantity, not quality.

- | | |
|-----------|-----------|
| 1. _____ | 11. _____ |
| 2. _____ | 12. _____ |
| 3. _____ | 13. _____ |
| 4. _____ | 14. _____ |
| 5. _____ | 15. _____ |
| 6. _____ | 16. _____ |
| 7. _____ | 17. _____ |
| 8. _____ | 18. _____ |
| 9. _____ | 19. _____ |
| 10. _____ | 20. _____ |

Now, review the above listing, and circle the top three most important to you.

TASK LISTS

Once you've identified your top three values, create task lists that you would need to complete to successfully integrate these three values into your life.

MOST IMPORTANT VALUE: _____

To-do list:

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____
- f) _____
- g) _____

After you have completed the list for your most important value, then move on to the second value, and then complete the third using the same process.

IMPORTANT VALUE: _____

To-do list:

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____
- f) _____
- g) _____

IMPORTANT VALUE: _____

To-do list:

a) _____

b) _____

c) _____

d) _____

e) _____

f) _____

g) _____

STEP 4: LIFETIME GOALS & TASKS

Next, we move to more of a goal-setting process, listing goals you hope to achieve in your lifetime. Consider what you would like to achieve in your lifetime, and list your lifetime goals. As with your values, it's more about quantity than quality, and the ordering is not important at this stage. There is no right number of goals to include here; you need to determine what feels right for you.

- | | |
|-----------|-----------|
| 1. _____ | 11. _____ |
| 2. _____ | 12. _____ |
| 3. _____ | 13. _____ |
| 4. _____ | 14. _____ |
| 5. _____ | 15. _____ |
| 6. _____ | 16. _____ |
| 7. _____ | 17. _____ |
| 8. _____ | 18. _____ |
| 9. _____ | 19. _____ |
| 10. _____ | 20. _____ |

Now, circle the top three from your list. Following the same process as with the values, create a task list for your top three goals.

MOST IMPORTANT GOAL: _____

To-do list:

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____
- f) _____
- g) _____

Complete the process with each of your top three goals.

IMPORTANT GOAL: _____

To-do list:

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____
- f) _____
- g) _____

IMPORTANT GOAL: _____

To-do list:

a) _____

b) _____

c) _____

d) _____

e) _____

f) _____

g) _____

STEP 5: FIVE-YEAR GOALS & TASKS

Now we want to bring the goals into a near-term focus. Following a now-familiar process, list your near-term goals, those you'd like to achieve in the next five years. Once again, it's more about quantity than quality, and the ordering is not important at this stage, and the number of goals that is right is determined by you.

1. _____ 11. _____

2. _____ 12. _____

3. _____ 13. _____

4. _____ 14. _____

5. _____ 15. _____

6. _____ 16. _____

- 7. _____ 17. _____
- 8. _____ 18. _____
- 9. _____ 19. _____
- 10. _____ 20. _____

Circle the top three from the above listing. As before, run your top three through the task-list process.

MOST IMPORTANT GOAL: _____

To-do list:

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____
- f) _____
- g) _____

Complete this for each of your top three five-year goals.

IMPORTANT GOAL: _____

To-do list:

a) _____

b) _____

c) _____

d) _____

e) _____

f) _____

g) _____

IMPORTANT GOAL: _____

To-do list:

a) _____

b) _____

c) _____

d) _____

e) _____

f) _____

g) _____

STEP 6: SIX-MONTH GOALS & TASKS

If you only had six months to live, how would you spend them? List your near-term, immediate goals. Again, it's more about quantity than quality, and the ordering is not important at this stage.

- | | |
|-----------|-----------|
| 1. _____ | 11. _____ |
| 2. _____ | 12. _____ |
| 3. _____ | 13. _____ |
| 4. _____ | 14. _____ |
| 5. _____ | 15. _____ |
| 6. _____ | 16. _____ |
| 7. _____ | 17. _____ |
| 8. _____ | 18. _____ |
| 9. _____ | 19. _____ |
| 10. _____ | 20. _____ |

Circle the top three and run them through the task-list process.

MOST IMPORTANT GOAL: _____

To-do list:

- a) _____
- b) _____
- c) _____

d) _____

e) _____

f) _____

g) _____

IMPORTANT GOAL: _____

To-do list:

a) _____

b) _____

c) _____

d) _____

e) _____

f) _____

g) _____

IMPORTANT GOAL: _____

To-do list:

a) _____

b) _____

c) _____

d) _____

e) _____

f) _____

g) _____

STEP 7: THE BUCKET LIST

MY BEGINNING BUCKET LIST

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

13. _____

14. _____

15. _____

16. _____

17. _____
18. _____
19. _____
20. _____
21. _____
22. _____

STEP 8: ONE-YEAR PLAN

Annual plan: This rough outline should be tailored to fit *your* goals.

PERSONAL GOALS:

THEME:

A. _____

1. _____

2. _____

3. _____

4. _____

B. _____

1. _____

2. _____

3. _____

4. _____

C. _____

1. _____

2. _____

3. _____

4. _____

CRYSTAL BALL

Step 1: Describe the year ahead based on the crystal ball's prediction. _____ year has come and gone, and we "rocked" because we achieved the following specific and measurable *outcomes*.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Step 2: What are the top five or six specific and measurable things that made it such a great year? Rank them in order. These are the *activities* that led to the result in step 1.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

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