

APPENDIX 3: YEAR-IN-REVIEW SAMPLES

REVIEW OF 2018 PERSONAL GOALS

STATS:

	2018	2017
Exercise days	246	242
Wine days	237	208
Exercise hours	396	390
Run miles	1,055	722
Marathons	3	2
Strength hours	105	106
Bike miles	63	1,216
Rowing hours	44	59
Blood platelets	8	8
Golf rounds	15	7
Top 100 Golf	2	1
Air miles	150,420	120,954
Number of flights	104	108
Speak gigs	64	84

	2018	2017
Books	26	29
Movies	112	64
Nights home	198	245
Nights for business	76	79
Nights for fun	91	41

HIGHLIGHTS:

1. Memorial for Bonnie in Cape May, along with weeklong family reunion
2. Leslie surprisingly arrived in my life in June
3. World travel—Ireland twice, Beijing, Australia, London, Berlin
4. Two cruises in Caribbean
5. Rim2Rim2Rim in Grand Canyon
6. Maui week, lots of activities
7. Great Wall of China Marathon for seventh continent
8. Fiftieth state marathon in New Jersey
9. Number one Pine Valley golf course
10. Potato Chip Rock twice
11. Rejoin golf club Marbella
12. Rod Stewart concert
13. Patron at the Masters

14. Hot-air balloon in Australia
15. Kayak Vancouver
16. Hike mountain in Vancouver
17. Copter through Chicago tour
18. *Love* (Cirque du Soleil) in Vegas
19. *Absinthe* twice in Vegas
20. *Wicked* in San Diego
21. Temecula wine country
22. Christmas celebrations on both coasts

COMMENTARY:

Instead of losing ten pounds to 175, ended year at 186. Workouts on plan. Big accomplishments with fiftieth state marathon and Great Wall of China Marathon for seventh continent. Significant shortfall on both swim and bike goals, as triathlons were zero point of focus. Strength and rowing goals on plan. Blood platelets over plan, making a difference. All doctor visits, floss/water, and sleep goals met. World travel as planned. Visits with the Young family on plan. Getting close on Top 100 Golf Course goal; nailing Pine Valley was a biggie. Rejoined golf club (Marbella) and took four golf lessons. However, goal of fifty rounds underachieved by a lot with fifteen rounds. More emphasis in 2019. Several bucket list items knocked off the list, and those do not carry over to 2019. Several house improvements completed. Books close to plan, and movies more than double plan. Nights for business were on plan, and actually shifted some home nights to fun nights when Leslie arrived in my life (June).

Overall, a successful year and look forward to 2019. A full life, a blessed life, a life by design.

YEAR IN REVIEW 2016—JACK DALY

DEC 31, 2016

For those readers new to this annual write-up, this is my summation and reflections on the personal side of my life, similar to a board of directors report in the business world. As noted in last year's report, Bonnie declared I was overextending myself, and as I reflected on the year, I agreed to scale it back a bit. At the same time, I noted that the year would be jammed with more than most would be willing to venture out on. Both were accomplished.

Before reviewing my personal happenings, a quick recap of the family. Sadly, over the Christmas holidays, Bonnie's mom, Peg, passed away. She lived ninety healthy years, of which I knew her for more than fifty, and we were fortunate to have her close by in California for the last few years. Grateful for the years we had. Looking ahead, we are focused on June 2017, as son, Adam, became engaged to "his" Melissa, and the wedding is in June. Our grandsons Malcolm (8) and Wyatt (4) continue to grow in so many ways and will be joined by Jake with the big wedding. Daughter Melissa's health all points to a positive direction, and Bonnie and I celebrated our forty-seventh wedding anniversary. Time flies!

So I call it *life by design*, and I've been practicing it for decades. I hope readers of this report are personally encouraged to "step up their game" and reach for their dreams. They are truly in reach.

HIGHLIGHTS:

Tough to pick an opener, but moving to our new home that we had been eyeing for a decade sure has to rank up there. Took the opportunity with the move to build a custom wine cellar, which is

fully stocked with one thousand bottles, so come by and visit. Of course there were plenty of marathons, which will be noted later, but traveling to Greenland with Mark Moses and running the Polar Circle Marathon certainly makes the highlight reel! Published my third book in three years (titled *The Sales Playbook*) with Dan Larson and now can lay claim to *number one Amazon best seller* three years running. Pursuit of my bucket list recorded so many “ticks of the boxes”: Phoenix Open with stadium seating on hole sixteen with Rick Iovine; Kentucky Derby with Adam Witty and my Business Manager, Jennifer, and her husband, John; Ryder Cup with host Lane Gold; Mount Rushmore; Dubrovnik visit; gondola ride in Venice; dogsledding in the Arctic; Barossa wine retreat; stadium roof walk in Adelaide with Jim Moularadellis; glacier and icebergs in Greenland; golf on some of world’s finest in Tasmania, Australia, Ireland, and the United States; Pompeii ruins; and completion of my tour of the presidential libraries. Grateful to have my supportive wife, Bonnie, with me on so many of these adventures.

BALANCE:

Thirty-plus years ago, we moved to weather-friendly Southern California, which we enjoy immensely. Yet I’m here less than half the time, as I jet around the world with my speaking profession and personal pursuit of my bucket list. Left unchecked, I could find myself “hotel caged.” Years ago, Bonnie and I agreed to decide in advance the number of nights away from home as a max, and my Business Manager, Jennifer, does a great job orchestrating the calendar accordingly. We decided to increase the number of nights home in 2016, and the good news is 168 in 2017 (and the plan was 157) versus prior year actual of 121. Here’s a historical look at how it works.

YEAR	2017		2016		2015	
	Plan	Actual	Plan	Actual	Plan	Actual
Business	111	107	111	131	125	146
Home	173	168	157	121	131	138
Fun	81	91	98	113	109	81

The plan of optimizing a combo of business and personal travel was the key to execution here. As can be seen of a review of the above stats, for the most part, things that get measured get done. The highlight was not just more days at home than planned, but year-over-year comparison was a net gain at home of forty-seven days—or 39 percent improvement in that desired metric. Goal in 2017 is a similar performance, with several at-home vacations planned with friends/family.

Health/fitness: Fitness results in 2016 were a mixed bag—some highs, some lows, and an overall improvement from 2015 yet shy of prior years when I had Ironmans on my calendar. I've targeted one full Ironman and two 70.3 Ironmans in 2017, so overall exercise levels should go up. Overall exercise hours were nearly one hour per day with a total of 356 hours compared with last year's 283.

On the racing front, it was nine overall marathons, bringing lifetime tally to eighty-eight in my quest for one hundred. Of those nine, six were new states, bringing state total to forty-nine (New Jersey is the missing state, which will happen in October). Surf City Marathon was the first of the year, which made for a full weekend for Rick and me, as we spectated at the Phoenix Open the day before. The following weekend I raced Mississippi Marathon, a point-to-point raced in 26.2 miles of headwinds. Mike Wein and Susan Haag were

YEAR	2013	2012	2011	2010	2009	2008
	Actual	Actual	Actual	Actual	Actual	Actual
Business	138	109	117	119	101	132
Home	142	179	151	188	175	141
Fun	81	81	98	68	78	83

out there running Atlanta Marathon for my state number forty-six. (Mike is a world-recognized age-group performer in the Ironman sport, and Susan logged her one hundredth Ironman in 2016.) In May I squeezed in local OC Marathon and a new state—Fargo, North Dakota—where I was joined by Andy Heck (always great to have company!). My favorite 70.3 Ironman in Honu was raced, albeit where I pretty much walked the run, as I was truly fatigued. Scenic Montana Marathon was next, followed three weeks later in Omaha, where I qualified and competed in the USA National Olympic Triathlon Championship. (I was way back in the pack, whereas speedster Mike Wein was near the front!) Three weeks later I found myself in a Roswell, New Mexico, marathon, which was really lonely with fewer than fifty marathoners in total on an out-and-back route. Bonnie rooted me on in South Dakota for state number forty-nine in early October, just as that part of the country was closing down for the cold winter weather. Fun visit to Mount Rushmore and Crazy Horse Memorial was the bonus here. Two weeks later, it was Mark Moses and I knocking out the Polar Circle Marathon. With the first 10K on an ice cap base and knee-high snow, coupled with an all-day race of minus twenty degrees and twenty-eight-miles-per-hour winds, it is now my number one favorite marathon of the eighty-eight lifetime. No intention to ever race it again, but one hell of an accomplish-

ment and lifetime memories! Special note was the goal of running one thousand miles in the year, which was accomplished Christmas Eve with my grandsons at the finish. 2017 plan is to wrap up all fifty-states marathons, all-continent marathons with the Great Wall of China in May, and an Ironman on all continents in November in Malaysia. Big stuff there! Summary of key stats follows:

YEAR	2017	2016	2016	2015	2015	2014
	Plan	Actual	Plan	Actual	Plan	Actual
Exercise days	250	222	225	184	225	242
Run hours	132	200	160	170	160	152
Run miles	700	1,000	1,000	893	1,000	974
Bike hours	252	79	130	61	180	154
Bike miles	4K	1,129	2K	954	2K	2,464
Swim hours	24	3	36	8	36	32
Swim yards (km)	72	6	100	21	100	87
Strength	72	74	60	35	60	69
Rowing (hours)	48	–	–	–	–	–
Total hours	528	356	386	273	436	407
Wine days	200	250	175	206	175	181

YEAR	2013	2012	2011	2010	2009
	Actual	Actual	Actual	Actual	Actual
Exercise days	228	240	245	268	254
Run hours	142	133	170	171	102
Run miles	728	785	1,056	930	585
Bike hours	183	251	178	220	222
Bike miles	2,858	3,992	2,855	3,463	3,903
Swim hours	35	43	51	87	76
Swim yards (km)	100	125	157	260	218
Strength	65	66	81	99	93
Rowing (hours)	–	–	–	–	–
Total hours	427	498	480	577	493
Wine days	169	173	156	143	178

Weight maintained acceptable delta to 180 year round. Big step up in hours and exercise overall planned for 2017, reflection of tracking bike on both outside and stationary, goal of rowing added, and commitment to racing another full Ironman. Five hundred twenty-eight hours is a step up over the past couple of years but consistent with prior Ironman years. It's all about commitment. This

step up should result in desired weight loss of around ten pounds. Increased planned wine days is more planned time at home combined with new wine cellar. Cheers and balance!

Doctor visits were all completed according to goal, each with positive reports. Blood platelet donations were eight, compared to goal of five. This is significant for me, as each visit positively impacts on average three people's lives. Lifetime donation count now over two hundred. Water intake and flossing on plan, and backed off the "shakes," as no material improvements seen last year as a result. Overall sleep hours per night have improved to an average of six per night, although big variances with travel schedule. Note as well, too many sick days during the year, as well as periods of exhaustion, so need to stay alert about overextending myself.

Family / grandparenting from afar: Kids living on both coasts, with their own adult agendas; grandkids with their school and activity schedules and living on opposite coast; and a world-traveling schedule sure provides its challenges to family time. We celebrated Christmas twice, a week apart on each coast, thereby getting to see all. The Youngs visited us for a week on the California beaches, which was terrific but too short. As well, we linked up as the calendar and travel provided. This will continue to be an ongoing challenge, requiring work and coordination by all in the family. The upcoming wedding and a family cruise, as well as year-end holidays, will all enhance 2017 in this regard.

Travel: As is customary, the actuals pretty much fall in line with plan, as most is booked a year or more in advance. One hundred sixty-eight air flights were logged in 2016, compared with 170 in 2015. That represented 219,991 miles, compared with 216,157 miles in 2015. Fun fact is always my personal car mileage—4,126 miles this year compared to 2,420 miles. (As Bonnie reminds me,

you can't log many when you aren't home!) World travels were show-stopping: Amsterdam magical; Dublin, Ireland, pure fun; two visits to Australia, one with Bonnie, where we were hosted by our good friends the Moularadellis and ventured to our favorite Barossa wine country; my first visit to Tasmania, and it surely won't be my last; returned for second visits back-to-back years to Kuala Lumpur and Singapore, and I can never get enough of those (special note that I took on the stinky fruit—Durian—hosted by George Gan); tremendous hospitality shown to me by EO in both Panama (where we private-flight toured over the canal) and Nova Scotia; bike toured Copenhagen on way to Greenland; a relaxing week on the Big Island of Hawaii, built around Ironman 70.3; plenty of stops throughout North America; the lifetime memories of Greenland, with dogsledding, ice fjords, etc.; and sharing a truly special trip with Bonnie to Venice, Rome, and a cruise along the Croatian coast (including so many great stops such as the Pompeii ruins and Dubrovnik, to name a few).

And to think that 2017 schedule has more bucket list visits in store!

Catchall: I played double-digit (eleven) rounds of golf for the first time in years, whereas I used to play triple-digit numbers of rounds. This was enough to get the golf bugbite, so I now plan to up the rounds in 2017. Of the eleven rounds played, three were on the Top 100 in the United States, bringing me to ninety-two on the list of one hundred. As well, several more of the rounds were on the Top 100 of the World list. The Phoenix Open with the infamous sixteenth hole was a total hoot. More like a four-day Woodstock concert experience, where I'm convinced many never saw a single golf swing! The Kentucky Derby was a longtime bucket list that got checked off, and it's always fun to hold the winning ticket ("costumes" were all you've ever thought of, and then some). Visiting

the presidential libraries has turned out to be one of the more fun excursions I've taken on (each with its uniqueness and oddities). The Ryder Cup was so much fun that I believe I will be a regular when it's in the United States and possibly when in Europe as well. (Note, golf like you've never experienced, particularly on the fans' side of the ropes.) Touring Venice, Italy, is a lifetime highlight, and Bonnie did it right with reservations at the Hotel Gritti. Murano glass visit and purchase, gondola ride, and historic visits were a few notables. Windstar Cruises are always living a life of the rich and famous (at least for a week!). A weather challenge on the route provided us a bonus stop in Pompeii ruins, which was mind boggling. Every port was a wow! Rome is Rome (can never get enough!). Back in the States, we really marveled at Mount Rushmore. I'd love to tell you about my private tour of the CIA headquarters (thanks to my good friend Simon Sinek), but if I shared, I'd have to eliminate you. Suffice to say, it was special. And then there was Greenland and that North Pole Marathon. (Stop by our house and see the customized photo book; a picture is worth a thousand words.)

I read thirty-eight books, compared with goal of twenty-four, and watched eighty-seven movies, compared with a plan of sixty. (Remember—lots of air flights.) The plan was to have 104 home-cooked meals, and Bonnie outdid herself cooking up 112, another contributor to my few pounds of weight gain. Plan for 2017 has been upped to 117. (Hey, more nights at home, seems only fair.)

My personal goals for 2017 are posted in a separate document; suffice to say, they are equally ambitious. (Life is to be lived!) Additionally, my business plan and highlights are covered separately, and there are quite a few exciting new endeavors scheduled there as well. My speaking gig count was managed to ninety-one for 2016, managed down from the 113 of 2015. For 2017, the plan count is one hundred.

Summary: I'm grateful for the life I have and the people I count as friends. I'm privileged to be able to share my experiences with others so they might elevate their lives and businesses. I'm blessed with good health and a robust business. Excitedly looking forward to 2017, and hope to see many in my travels.

THIRD QUARTER 2014 REVIEW

HIGHLIGHTS:

What a life! And where do I start? Family reunion of a week at Long Beach Island, two Top 100 Golf Courses, three triathlons, two wine-country visits, James Taylor concert, 9/11 Memorial visit, and the list goes on! Perfect weather for our return to Long Beach Island after thirty years away, hosting family aging from two to sixty-five. Week included a marriage proposal, the Cast House lodging with ten bedrooms, and so much family fun and bonding. Top 100 Golf Courses—now played at eighty-four, picking up Atlantic City Country Club, where terms *birdie* and *eagle* were started, and also the legendary Bethpage Black in New York, which was every bit as challenging as noted for. The NYC Triathlon was superfun, with a Hudson River current assist, posting a sixteen-minute swim, and an all-around great race—I will be back for this again. Following month was Santa Barbara Triathlon, one of the world's oldest, nearing a Half Ironman distance. Major bike crash with two miles to go (no broken bones, just broken bike) yet posted the fastest run in age group, just missing the platform finish. (It was also the annual GOT race, making it even more special.) Next month, it was Olympic-distance tri in San Diego, placing first in age group (too funny, only in age group and oldest competitor in the race!). Temecula and Santa Ynez wine-country visits were both fun and unique. Day before the Long Beach Island reunion, several of

us took in my favorite James Taylor concert, always a highlight and fun to share with several friends/family. The 9/11 Memorial visit was surely touching and moving and should be on everyone's to-do list, so tastefully done. Baseball-park visits continued, with great seats at Wrigley Field for one hundredth anniversary and final home game for the Padres. Great progress made on next book with my partner Gov, *Paper Napkin Wisdom*, hoping for a publication near year end. All this while suffering from more days sick in a quarter than I can ever recall!

Weight unchanged at 180. Hit the wine hard this quarter with wine country and increased time at home. Throughout nine months, 132 days vs. 120 same time last year. Workout days close to same, 186 vs. 194 year prior, ahead of plan of 168. Exercise hours at 311 vs. 341 a year ago, reflecting my being sick of late, near plan to date. Run miles/hours were 766/115 vs. 592/117 last year and plan of 750/120. Bike was 1,932/122 vs. 2,265/145 last year and plan of 2,475/165. Swim was 65K/23 vs. last year's 73K/26 and plan of 90K/36. Strength at fifty-one, same as prior year vs. plan of forty-five. Clearly, enthusiasm has waned for the triathlons, and racing looking to be curtailed in 2015, with more emphasis placed on marathons.

Books read at fifteen vs. plan of eighteen, as emphasis placed on writing *Hyper Sales Growth* and *Paper Napkin Wisdom*. Movies at fifty-seven vs. plan for forty-five, reflecting plane movies. Have gotten more into my golf, now at ten rounds, with several world-renowned tracks. Blood platelets donation at three, shooting for four by year end. Air mileage was 133,695/119 flights vs. 145,075/128 flights last year. Car mileage near nonexistent at 1,896 year to date, less than the 2,326 last year! My bike mileage alone is now ahead of it!!

Business nights away at 107 vs. 110 last year and plan of ninety-eight. Home nights at 102 vs. ninety-eight last year and plan of 102.

Fun nights away at sixty-four vs. sixty-one last year and plan of seventy-three. All within an acceptable range.

I'm thankful for the life I get to live and the generally speaking great health I enjoy.