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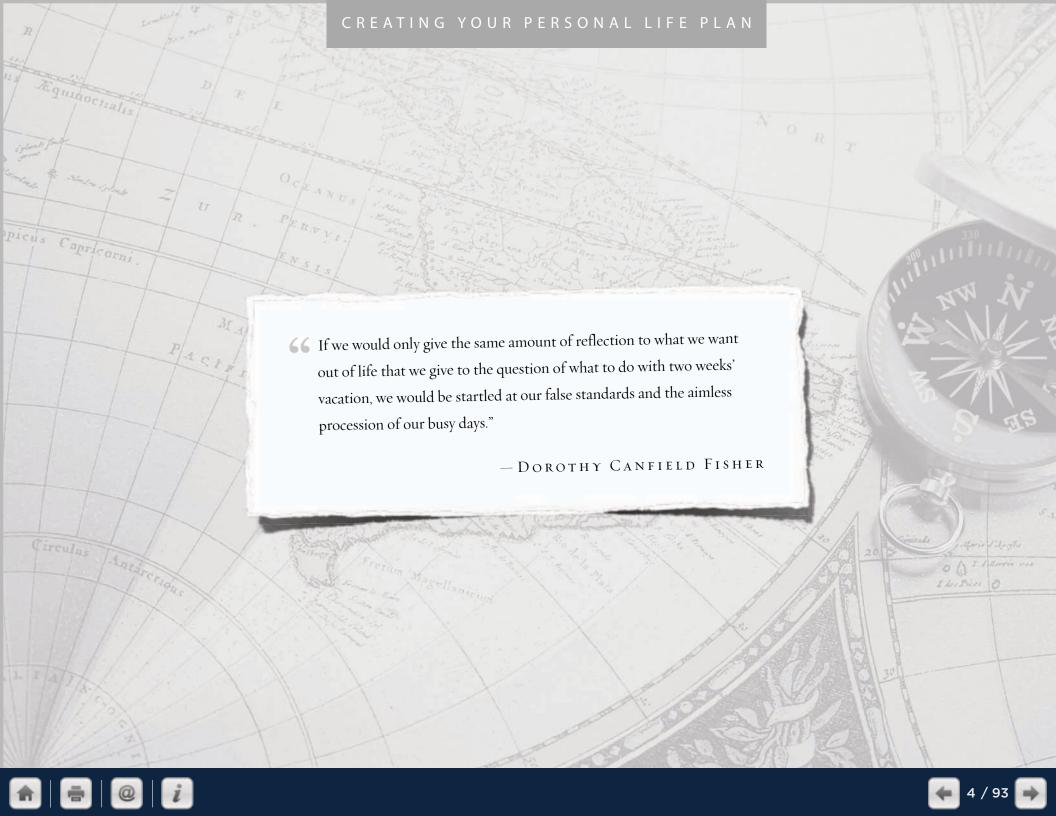












I HAVE MET VERY FEW PEOPLE WHO HAVE A PLAN FOR THEIR LIVES.

Most are passive spectators, watching their lives unfold a day at a time. They may plan their careers, the building of a new home, or even a vacation. But it never occurs to them to plan their life. As a result, many end up discouraged and disillusioned, wondering where they went wrong.

It happened to me.

In July of 2000, my boss suddenly resigned. With his departure, I was asked to take his job. I instantly became the publisher of Nelson Books, one of the trade book divisions of Thomas Nelson Publishers.

I knew our division was in bad shape. But I didn't know how bad things really were until I assumed this new role. We were the least profitable division in the entire company. As this began to sink in, I realized it was going to take a huge amount of work to turn things around.

Over the course of the next 18 months, I did very little other than work. I was constantly on the road. I spent innumerable evenings at the office. So did my team. As a result, we went from being the least profitable division of fourteen to the most profitable. I was soon promoted again and given additional responsibility.

But my success began to take its toll. My health started to falter.



As my workload increased, I stopped exercising. I ate more and more junk food and began to gain weight.

I eventually ended up in the emergency room, thinking I was having a heart attack.

Thankfully, I wasn't. But it scared me nearly to death and got my attention.

I realized that while I had a plan for my career, I didn't have a plan for my life. If something didn't change, I was going to burn out, break down—or worse.

On the recommendation of a friend, I hired Daniel Harkavy, CEO and Head Coach of Building Champions, to be my life coach. He patiently explained that life didn't have to be this way. I could live my life on purpose and with balance. The first assignment he gave me was to create a "Life Plan."

This was the first time I ever thought systematically about what outcomes I wanted to see in the major categories of my life. "This won't insulate you from life's many adversities and unexpected twists and turns," Daniel warned, "but it will help you become an active participant in your life, intentionally shaping your own future."

This experience of creating a life plan, regularly reviewing it, and updating it as necessary, has been *transformational*. As my family, friends, career, and other interests have grown, this document has kept me on track, ensuring that I keep everything in balance (more or less).

When things get chaotic, my life plan serves as a map. It tells me where I am and how I can get back on the path to my intended destination.



In this e-book, I will share with you how to create a similar a plan for your own life. I am convinced it is one of the most important steps you can take to ensure that you are living a life on purpose, achieving what matters most—in every facet of your life.

My plan is surprisingly short; it is only five pages long. It consists of three sections:

- Outcomes
- Priorities
- 3 Action Plans

OUTCOMES

In the Seven Habits of Highly Successful People, bestselling author Stephen Covey says that Habit 2 is to "Begin with the End in Mind." In his excellent book, *The E-Myth Revisited*, author Michael Gerber makes the ultimate application of this principle.

He says,



I'd like you to imagine that you are about to attend one of the most important occasions of your life.











^{1.} Stephen Covey, The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change (New York: Free Press, Revised Edition, 2004), 95– 144.



It will be held in a room sufficiently large to seat all of your friends, your family, your business associates—anyone and everyone to whom you are important and who is important to you.

Can you see it?

"The walls are draped with deep golden tapestries. The lighting is subdued, soft, casting a warm glow on the faces of your expectant guests. The chairs are handsomely upholstered in a golden fabric that matches the tapestries. The golden carpeting is deeply piled.

"At the front of the room is a dais, and on the dais a large, beautifully decorated table with candles burning at either end.

"On the table, in the center, is the object of everyone's attention. A large, shining, ornate box. And in the box is ... you! Stiff as the proverbial board.

"Do you see yourself lying in the box, not a dry eye in the room?

"Now, listen."2

After reading this short vignette, I asked myself, "What will they say when I am dead?"

This is an incredibly powerful question. To answer it, you have to "fast forward" to the end of your life and look back. This exercise forces you to think about the things that matter most.



^{2.} Michael Gerber, The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It (New York: HarperCollins, 1995), 137.

I selected six key constituents or audiences that matter to me. . . . I then simply answered the questions "How do I want them to remember me?"

I selected six key constituents or audiences that matter to me: God, my spouse, my children, my parents, my colleagues, and my friends. (You may have others.) I then simply answered the question, "How do I want them to remember me?"

For example, under "My Spouse." I said this:

HOW I WANT TO BE REMEMBERED

By Gail:

I want Gail to remember how I loved her, understood her, and helped her accomplish her dreams. I want her to remember specific times that we shared together—times we laughed, times we cried, times we spent discussing things that were important to both of us, and times we just held one another and watched the sunset.

Under the "My Colleagues" category, I said this:

HOW I WANT TO BE REMEMBERED

By My Colleagues:

I want my colleagues to remember my servant-leaderships my integrity, my humility, and my commitment to having Fun. I want them to remember how much they learned and grew as a result of knowing me. Most of all, I want them to remember how I stood for the greatness in them and empowered them to accomplish far more than they ever thought possible.

As you go through this exercise, I would encourage you to do as Gerber suggests and visualize your own funeral. I don't intend this to be morbid, but you must understand that life is short. When you are gone, the only thing you will leave behind is the memories that you have created.

What will people be saying about you at your funeral? What will they think as they reflect on their relationship with you and your impact on their life?

The good news is that you can shape these conversations beginning today.

PRIORITIES

Next, you need to identify and prioritize your "life accounts." As Daniel Harkavy explains in his book, *Becoming a Coaching Leader*, life is like a collection of bank accounts.³ Each has a certain value. A few have large balances, others might have respectable balances, and one or two might be overdrawn.

For example, your career might be going great, but your health account is overdrawn—you are eating too much junk food and you are not exercising regularly. This was my experience.

Or perhaps you're in great shape physically, but your marriage has gone flat. You and your spouse have become like strangers living in the same house.

In the Priorities section, your goal is simply to answer the question, "What is **important** to me?"

^{3.} Daniel Harkavy, Becoming a Coaching Leader: A Proven Strategy for Building Your Own Team of Champions (Nashville: Thomas Nelson, 2007), 60f.



By way of example, I have eight accounts:

- 1. God
- 2. Self
- 3. Gail
- 4. Children
- 5. Friends
- 6. Career
- 7. Finances
- 8. Ministry

God

If you are a Christian, God obviously comes first. Jesus said, "But seek first the kingdom of God and His righteousness, and all these things shall be added to you" (Matthew 6:33).

He is the ultimate priority. Until He is first, everything else will seem out of kilter.

On a practical level, I read the Bible first thing each morning. I want to get a divine perspective on life. I also pray in the morning, either while exercising or on my commute to work. In addition, I pray before meals, and various points throughout the day, and right before I go to bed. Sometimes, it's formal; sometimes it's not. Most often, it's simply an ongoing conversation.

Self

Perhaps surprising to some people, I come next. That's right, *me*. I don't think this is because I am selfish or ego-centric. (Okay, maybe a little.)

It's because I can't take care of anyone else unless I take care of

If you travel much by plane, you have probably heard the flight attendant say,



In the event of a change in cabin pressure, panels above your head will open revealing oxygen masks. Pull the mask down toward you to activate the flow of oxygen. Cover your nose and mouth with the mask. Place the elastic band around your head and continue to breathe normally. Remember to secure your own mask before assisting others."

This is how I look at life. I have to attend to myself first (second only to God) in order to be spiritually, emotionally, intellectually, and physically *available* to others. If you have trouble with the semantics of putting yourself second, think of it as *preparation to serve others*.

For example,

- If I don't feed myself spiritually, I don't have the spiritual resources necessary to edify others. This is one reason I read the Bible and pray daily.
- If I don't look after my own health and become sick, I am not much use to my family or my employees. This is why I run and try to eat nutritionally sound food.



- If I don't make time for reading great books, I don't have the intellectual resources I need to enrich others.
- If I don't make the effort to work through my own emotional wounds, I end up reacting to others instead of being in a position to minister to them. This is why I think counseling and therapy is a valuable endeavor for most people.
- If I don't get sufficient rest, I get grumpy. No one wants to be around me. This is why I try to sleep a solid seven hours every night.

Plus, I want to model how to take care of myself, so that my children will take care of themselves.

Some people put themselves at the bottom of their priorities list, but I think this is a false—and very dangerous—piety. We are in a much better position to serve others when our basic spiritual, emotional, and physical needs are met.

I actually break my Self account into three sub-accounts: Health, Growth, and Rest. That's how important I think this account is to everything else I want to accomplish. To borrow a phrase from Stephen Covey, this is where I "sharpen the saw."



Spouse

It would be easy to lump my spouse and my children into one category called "Family." But these are two discrete categories for me. My wife, Gail, takes priority over my children. She came before the children entered our lives; she will be around long after they have left home.

A good friend once told me,

"The most important gift you can give your children is to love their mother."

How true—especially in an age when broken homes are increasingly the norm. A healthy marriage is a legacy that will pay dividends to your children and grandchildren for generations.

What does this look like from a practical standpoint? It means that Gail and I spend intentional time together. For example, Friday night is "date night." Sometimes we go out alone, sometimes with friends. Regardless, this is our time to connect with one another.

On Saturday mornings, we sometimes walk down to the bakery two blocks from our home and have a late breakfast together. Occasionally, one of my married daughters and grandchildren join us. We don't have a fixed routine for the rest of Saturday. We just kind of let it happen. (We both love it that way!) On Sunday we go to church and have lunch together with the whole family or as many of them as we can corral.



By the way, with regard to "projects around the house," I follow Clint Eastwood's advice in the *Dirty Harry* movies:

"A man's got to know his limitations."

I am the most mechanically-challenged person I know. I know the difference between a hammer and a screwdriver. After that, it gets kind of fuzzy.

So, I don't do a lot of household repairs. I usually ask one of my sons-in-law, hire someone, or—if I wait long enough—let Gail do it. Seriously, having grown up with four older brothers, she is very good at this stuff.

But, alas, your situation may be different. I know this can be a family activity. It was in Gail's family. She got to spend a lot of time with her dad by helping him around the house.

Children

My children come next. Frankly, this was very difficult when my daughters were young. (Did I mention that I have five?) I had a hard time balancing my work and my life. Sadly, both Gail and the children sometimes got relegated to the bottom of the list.

Fortunately, this was usually temporary. But I constantly had to fight to keep from neglecting my family. When I got too far astray, Gail would gently reel me in. Today, things are much easier. Right now, we only have one daughter living at home.

Not to wax too theological, but we see meals as sacramental (small "s") and a reminder of God's kingdom.... we see it as an opportunity to commune with one another and reconnect with the people we love most—our family members. I usually come home at about the same time every night. I leave the office promptly at 6:00 p.m. No exceptions. We try to eat together as a family as much as we can. Sometimes, especially at this stage in our life, it is often just the two of us.

Regardless, we try to make meal time special. Not to wax too theological, but we see meals as sacramental (small "s") and a reminder of God's kingdom. It's not just a "pit stop" or a refueling opportunity. Instead, we see it as an opportunity to commune with one another and reconnect with the people we love most—our family members.

When the girls were little, and we were seated at the dinner table, I would ask, "What is the best thing that happened to you today?" We still continue that tradition today when we are together. My married daughters even do it with their children. It focuses everyone on the positive events of the day.

Sometimes the girls would say (with a big frown or even a few tears), "Nothing good happened today." My wife, Gail, would always say, "I understand, but if you had to say one thing, what would it be?" Or, "What was the best thing of all the bad things?"

We have had some wonderful and amazing conversations based on this simple question. As a result, dinner always lasted for at least thirty minutes—sometimes an hour or more.

Friends

After family, my next priority is my friends. It wasn't always this way. I used to think that I got all the social interaction I needed at work. As an introvert, when I was away from work, I wanted to be alone.

But in the last few years, I have come to appreciate my friends more than ever. I have five "best friends" in my inner circle. Gail and I have a couple of close couple friends, too. Nothing is more satisfying that spending an evening with them—or even a vacation.









My goal in these relationships is to achieve "perfect moments." Eugene O'Kelly, former CEO of KPMG, one of the largest accounting firms in the world, learned about this the hard way. At age 53 he was diagnosed with late-stage brain cancer.

His doctors soberly told him he had maybe three months to live. He quickly came to the conclusion that recovery was impossible. A miracle was unlikely.

Over the next 90 days, he determined that he would die well. In true CEO-fashion, he created goals for himself. He made a list of important relationships he wanted to "unwind." By this he meant that he wanted to bring *closure* to those relationships and communicate how much each person had meant to him.

He also learned to meditate. And, most importantly, he tried to create as many "perfect moments" as he could. According to O'Kelly, a *perfect moment* is an experience with others when time stands still.⁴ It is a time full of the present, when the past is left behind and the future is set aside. It is a special time of focused attention and heightened awareness.

Interruptions and distractions are consciously excluded. Cell phones are off. Hearts are wide open. All that matters is this moment—the people I am with and the conversation we are having *now*.

My goal is to make every encounter I have with my friends a perfect moment—for them and for me.

To do this, you have to be intentional.



^{4.} Eugene O'Kelly, Chasing Daylight: How My Forthcoming Death Transformed My Life (New York: McGraw-Hill, 2007), 110f.



Career

Next comes my career. I think it is really important that this come after God, self, spouse, and children. I have seen too many people sacrifice the other four on the altar of work. Usually when that happens, their work life crumbles, too.

Work can be a rewarding experience if you keep it from becoming an idol. However, if you don't put it in its place, it can suck the life out of you. No one ever said at the end of his life, "Man, I only wish I had spent more time at the office."

I only work about fifty-five hours a week. I usually work eight to nine hours during normal work hours. Then I work another hour or so on e-mail after dinner. I also work for a few hours on Sunday evening as I prepare for the upcoming week.

Occasionally, I will work more than this, but never less. If I try to work too much more than this, I find it becomes counter-productive. In fact, at some point, I believe there is an inverse relationship between time at work and productivity. It's kind of like golf—you play the best when your grip is relaxed.

Finances

For too long, I didn't give attention to this area of my life. It wasn't that it wasn't important, it's just that I thought I could outrun my expenses by making more money.

In the 1990s, I made a terrible financial mistake. As a result of my success as a writer and a speaker, I made some significant extra income. I was also holding down a full-time job. I could barely keep up with it all.



So I decided to hire a financial advisor to help me manage my money. I had heard him speak at a conference where I was also a speaker. I was impressed by what he said. We got further acquainted backstage during the conference.

Long story short, I hired him to assist me in managing my money. At the time, I thought I was very smart. As it turns out, it was probably the dumbest thing I had ever done in my life—and that's saying a lot.

The first thing he did was set up a "tax shelter" for my investments. It was creative and brilliant. Or so I thought. I saved tens of thousands in taxes alone. The only problem was that it turned out to be a scam.

I didn't realize it until four years later when I got a notice from the IRS. Talk about something taking your breath away. I almost passed out.

> It took me almost three years to get it resolved. I went through agony—an expensive and timeconsuming audit and scores of sleepless nights. The uncertainty of how it would turn out gnawed at me constantly.

Thankfully, my nightmare eventually came to an end. But at a big cost. With interest and penalties, I paid more than twice my entire investment. It was a miracle that I survived.

I learned the hard way that I have to be proactive in managing my money. Now Gail and I sit down once a month, assess where we are and make the necessary adjustments.





Ministry

After work comes my ministry. This is the fruit of everything else. I know some people who put it first, but it quickly becomes a relentless tyrant, squeezing out every other priority.

I find that my ministry has a much more powerful impact when everything else is in order. In other words, it has to be the fruit of a life well-lived. Perhaps this is why one of the qualifications for a church leader is that he "rules his own house well" (2 Timothy 3:4)

Gail and I have been at the same church for twenty-seven years. Our relationships there are long and deep. I serve as a deacon and also teach an adult Sunday school class.

My greatest joy, however, is leading a formal mentoring group with eight young men. I have been doing this now for more than a year. We meet twice a month in my home for two hours. We talk about everything—God, spouses, children, work, and the temptations and struggles we face as men.



Admittedly, this may sound like a lot of activity. But the important thing is that it is *intentional*. I want to live my life proactively rather than "sleep-walking" through it. The bottom line is that you don't need to get everything done. You only need to get the *right* things done and leave the rest with God.

But how do you live out these priorities in the rough and tumble of daily life? How do you protect them and ensure that they get the attention they deserve?

That's where Action Plans come in. This is where the proverbial "rubber meets the road."

Make no little plans; they have no magic to stir men's blood and probably will themselves not be realized. Make big plans; aim high in hope and work, remembering that a noble, logical diagram once recorded will not die."

— DANIEL H. BURNHAM



ACTION PLANS

In your Life Plan, you create an Action Plan for each account. This is where you think through where you are and where you want to be. I break each account down into five parts:

1. Purpose Statement:

This is where you state what your purpose is for each account. Again, using my Health account as an example, I say this:

My purpose is to maintain and care for the temple God has given me.

The Statement of Purpose for my Friends account is this:

My purpose is to befriend and love a few people well who will in turn love, challenge, and hold me accountable.

2. Envisioned Future:

This is where you describe how the account looks when you have a "positive net worth." In a financial account, it is easy to see. If the number is positive it is good; if it is negative (or red), it is bad.

Here, however, you have to do a little more work. You need to describe the account when it is functioning at its best, using the present tense, like it is *already* a reality.

For example, here's the Envisioned Future for my Health account:













I am lean and strong, possessing vibrant health and extraordinary fitness. My heart is strong and healthy. My arteries are supple and clear of obstructions. My immune system is in excellent condition: I am disease—, infection—, and allergy—resistant. I have more than enough energy to accomplish the tasks I undertake. This is because I control my mental focus, workout six days a week, choose healthy foods, take supplements as needed, and get adequate rest.

3. Supporting Verse:

A bible verse is optional, of course. It may not be important to you. But it is important to me, because I want my life to be built on transcendent values that have stood the test of time.

The bible verse I chose for my Children account is this:

"Behold, children are a heritage from the LORD, the fruit of the womb is a reward.

Like arrows in the hand of a warrior, so are the children of one's youth." (Psalm 127:3-4, NHJV)

The Bible verse for my Career account is this:



So he who had received five talents came and brought five other talents, saying,

Lord, you delivered to me five talents; look, I have gained five more talents besides

them. His lord said to him, Well done, good and faithful servant; you were faithful over

a few things, I will make you ruler over many things. Enter into the joy of your lord.

(Matthew 25:20-21, NhJV)

4. Current Reality:

Now it's time to be brutally honest with yourself. Where are you in relationship to your Envisioned Future? Don't pull any punches. The more honest you can be, the more progress you will see.

I list these as a series of bullets and try to write down the first things that come to mind without too much analysis. For example, here's what I wrote a while back in my Health account.

- I feel great. My stamina is great. It has been a long time since I have been sick.
- I feel good about my weight and my overall fitness.
- I am running (or cross-training) four days a week for at least 60 minutes.
- I am not presently doing consistent strength training. I am concerned this will eventually catch up with me.
- I am eating pretty well, but I could be more consistent in avoiding high glycemic carbs.



I would share more, but, frankly, it's too personal. *And that is just how you want it*. You want it to be so personal and so honest that if anyone else read it, you would be embarrassed.

Keep in mind that you will not be sharing this document with anyone, except for one or two people you will intentionally enlist to keep you accountable. (In my case, I only share my Life Plan with Dan, my coach, and Gail, my wife.)

5. Specific Commitments:

This is where you specifically commit to certain actions in order to move from your Current Reality to your Envisioned Future. Again, I list these as a series of bullets. Using my Health account as an example, here are my specific commitments:

- Run (or cross-train) four days a week.
- Do strength training three days a week.
- Drink four liters of water a day.
- Make healthy food choices, as recommended in The South Beach Diet.
- Record everything I eat in LoseIt (a software application that tracks your calorie intake and exercise output).
- Get an annual physical and semi-annual dental check-up.

I have included the Action Plan for my Rest account on the next page. This will give you an example of what a complete Action Plan looks like.







ACCOUNT NAME:

Rest

PURPOSE STATEMENT:

My purpose is to pull back periodically from my duties and responsibilities just to reconnect with the things that are truly important.

ENVISIONED FUTURE:

I get adequate time for rest and relaxation. My schedule has a balanced rhythm between work and recovery. I get away at least once a quarter to connect with my vision and core values. I get away with Gail twice a year. I get away with my family once a year.

SUPPORTING VERSE:

"Take My yoke upon you and learn from Me, for I am gentle and lowly in heart, and you will find rest for your souls.." (Matthew 11:29, NHJV)



CURRENT REALITY:

- My annual time block needs to be revised.
- I skipped my last quarterly review.
- I am working too much on the weekends, just to keep up with my blog.
- I am usually getting a solid 7 hours of sleep a night. I feel rested.
- My travel schedule is actually giving me more opportunities for rest and reflection.

SPECIFIC COMMITMENTS:

- Continue getting at least seven hours sleep per night.
- Schedule my personal retreats (quarterly reviews) one year in advance. Do them, no matter what!
- DO NOT work longer than noon on Saturday on my blog.
- Schedule my personal retreats one year in advance. Do them, no matter what!
- Schedule my vacations one year in advance.

Here is an Action Plan for my friend Bob's Finances account (on the next page):





ACCOUNT NAME:

Finances

PURPOSE STATEMENT:

My purpose is to be a good and faithful steward of the financial resources God has placed at my disposal.

ENVISIONED FUTURE:

I am completely debt-free. In addition, we are financially independent: we could sustain our current lifestyle indefinitely, even without additional income. We have all the money we need to meet our obligations and accomplish our goals. We have six-month's worth of living expenses in an emergency fund. Because we have more than enough for our own needs, we are generous with others. As a result, we never worry about money.

SUPPORTING VERSE:

"In the house of the wise are stores of choice food and oil, but a foolish man devours all that he has." (Proverbs 21:20, NIV)





CURRENT REALITY:

- We have a budget for the current year.
- We have 60 days worth of expenses in our emergency fund.
- We are tithing consistently, but we are not giving beyond this.
- We are spending nearly everything I make, with the exception of my 401% contribution.
- I need to update my life insurance policy.

SPECIFIC COMMITMENTS:

- Add another 30 days worth of expenses to our emergency fund.
- Get back on track with our weekly "financial summits" with Sharon.
- Cut \$200 out of our monthly expenses.
- Begin sponsoring one World Vision child as a way of giving beyond the tithe.
- Work with Ben to get my life insurance policy updated.

When you initially create your Life Plan, I recommend that you set aside a full day to do so. If you can set aside two days, even better. This may seem like a lot of time, but I assure you, it's not.

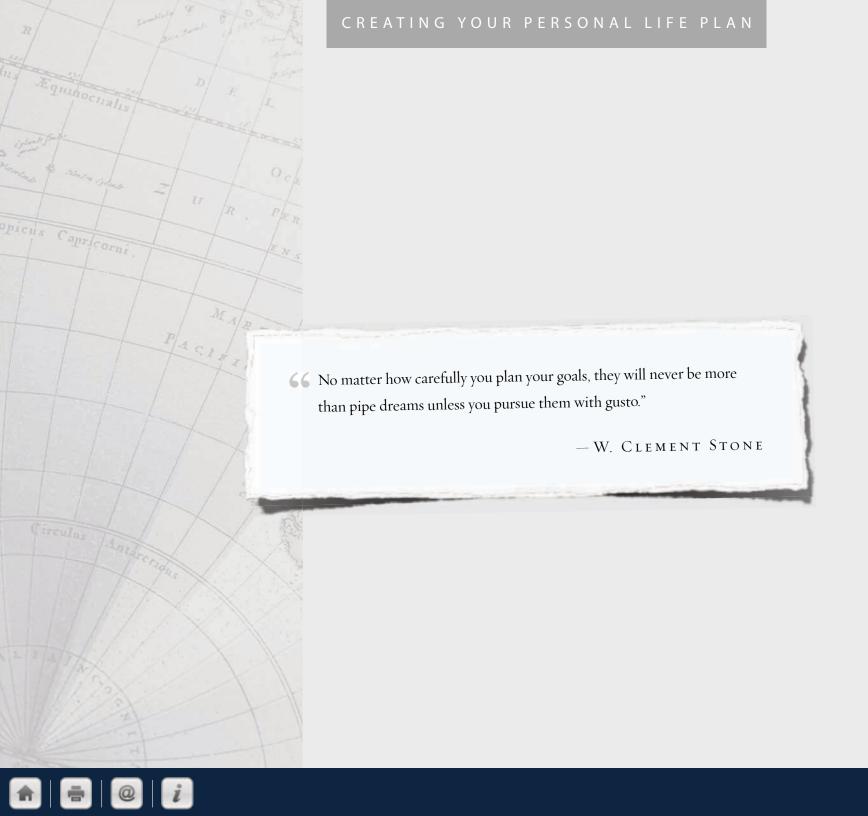
It's not the writing that takes this long. It's the thinking. In fact, this is the most important aspect of Life Planning: reflecting about your life and where you want it to go.

To get you started, I have included blank Action Plans at the end of this e-book. Or, if you prefer, you can download a **Life Plan Template** from my Web site:

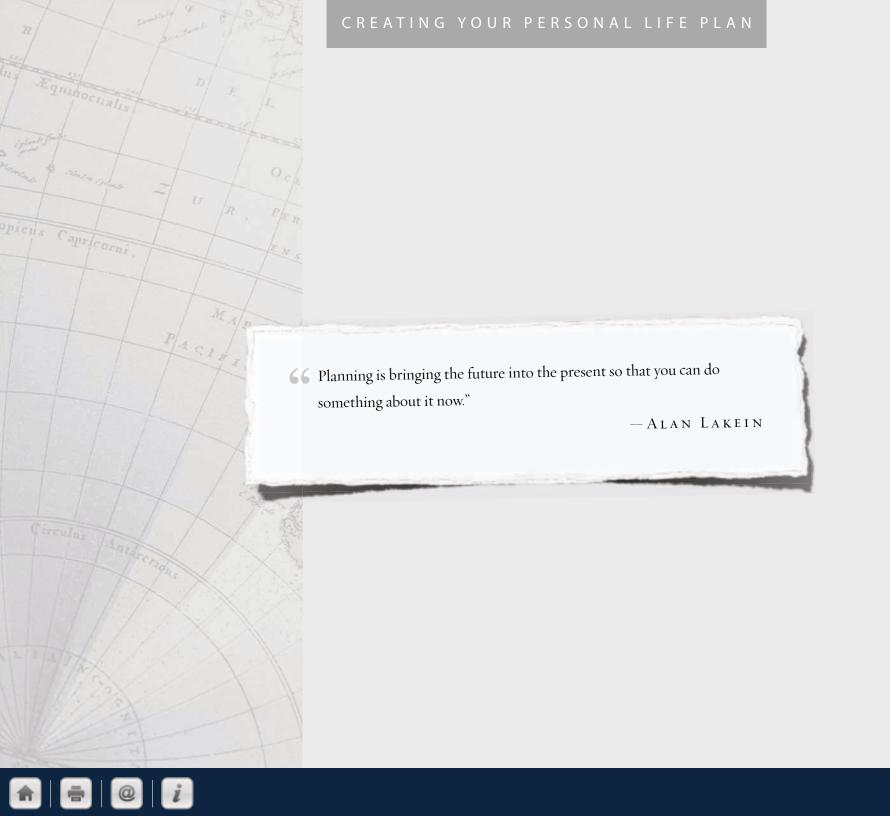
http://michaelhyatt.com/myresources/life-plan-template.doc

It is a simple Word document, which you can modify to meet your needs.









A PLAN IS WORTHLESS UNLESS YOU REVIEW IT ON A REGULAR BASIS.

Once you have your Life Plan complete, you must establish a pattern of regular review. I do this in my normal Weekly Review process. Let me describe that process, including my Life Plan review.

Let's be honest: In the fast pace of the modern business world, it is easy to lose your way and become reactive rather than proactive. As a result, you may forget to process notes from your meetings, put assigned tasks on your task list, or, looking forward, anticipate upcoming meetings and events for which you need to prepare.

When this happens, important items fall through the cracks. You end up embarrassed. Worse, you may frustrate your customers, colleagues, or even your boss. And you may end up a long way from where you stated in your Life Plan.

Part of the solution to this problem is the "Weekly Review." This is an opportunity to get your head above the daily blizzard of activities and see where you've been and where you're going. It's also an opportunity to see how you are progressing against what matters most—those items you have articulated in your Life Plan.

In my view, the Weekly Review is the key to staying on top of your projects and assignments. The result is that you stay in control of your workload and keep your business associates happy.

No one has written more compellingly about the importance of the Weekly Review than David Allen. In his book, *Getting Things Done* he writes:









If you're like me and most people, no matter how good your intentions may be, you're going to have the world come at you faster than you can keep up. Many of us seem to have it in our natures consistently to entangle ourselves in more than we have the ability to handle.

"We book ourselves in back to back meetings all day, go to after-hours events and generate ideas and commitments we need to deal with, and get embroiled in engagements and projects that have the potential to spin our creative intelligence into cosmic orbits.

"The whirlwind of of activity is precisely what makes the Weekly Review so valuable. It builds in some capturing, reevaluation, and reprocessing time to keep you in balance. There is simply no way to do this necessary regrouping while you're trying to get everyday work done."5

I usually do my weekly review on Sunday night. By this time, I am usually refreshed and have some perspective.

I also like doing it at home because I eliminate most of the distractions that keep me from truly getting my head above the fray at work. It also dials down the importance of my work, so that my other priorities don't get lost in the shuffle.

I schedule two hours for my Weekly Review. It rarely takes this long, but I like to have the time blocked off in my schedule. I find if I don't schedule it, it's easy to avoid this activity or schedule something else in this slot.



^{5.} David Allen, Getting Things Done: The Art of Stress-Free Productivity (New York: Penguin, 2002), 184–185.

I empty everything out of my briefcase, my inbox, and my wallet. I then go through each piece of paper and make a decision what to do with it.

What do I do during this time? Here's the "agenda" for my meeting with myself. This is modified from David Allen's list:

1. **Gather all loose papers and process**. I empty everything out of my briefcase, my inbox, and my wallet. I then go through each piece of paper and make a decision what to do with it.

Following David's model, I first decide if it is something that requires me to take action. If not, I have three options. I can:

- Trash it;
- Add it to my Someday/Maybe list; or
- File it for future reference.

If the item requires me to take action, I can:

- Do it if it takes less than two minutes or add it to my task list to do later;
- Defer it by actually scheduling a time on my calendar to deal with it; or
- Delegate it to someone else for action and enter it into my task list using the "@WaitingFor" category. (This is the name of my "pending" category, where I am waiting on someone else before I can move forward.)
- 2. **Process my notes.** I have written on my blog about the "The Lost Art of Note Taking." It's a critical productivity skill. I have opted for a low-tech solution, using a Moleskine notebook. I quickly read back through my notes, looking for action items that I agreed to do. (I mark these in my meeting notes with a "ballot box.")









- 3. **Review previous calendar data.** I look over the previous week's meetings in Google Calendar and see if there is anything I missed. For example, I don't usually take notes in lunch meetings, but I may want to follow-up with a thank you note or a gift.
- 4. **Review upcoming calendar.** This is one of the most important parts of the Weekly Review. I note any upcoming meetings with an eye to the preparation I need to do. This keeps me ahead of the curve and my assignments on track.

I am amazed at how many professionals show up at a meeting without reviewing their previous assignments. This makes them look sloppy and incompetent. Reality is that they don't have a process in place for systematic review of previous meetings and assignments.

- 5. **Review my action lists.** I also try to do this daily, but during the Weekly Review I ask myself the question, "What do I really need to accomplish this week?" If it's a really important task, I will drag it to my calendar and schedule it.
- 6. **Review my @WaitingFor(or Pending) list.** This is a list of items I have delegated to others and are important enough to track. If something is overdue, or if I need a progress report, I send an e-mail and nudge the person responsible. I note in the task itself that I sent a reminder.



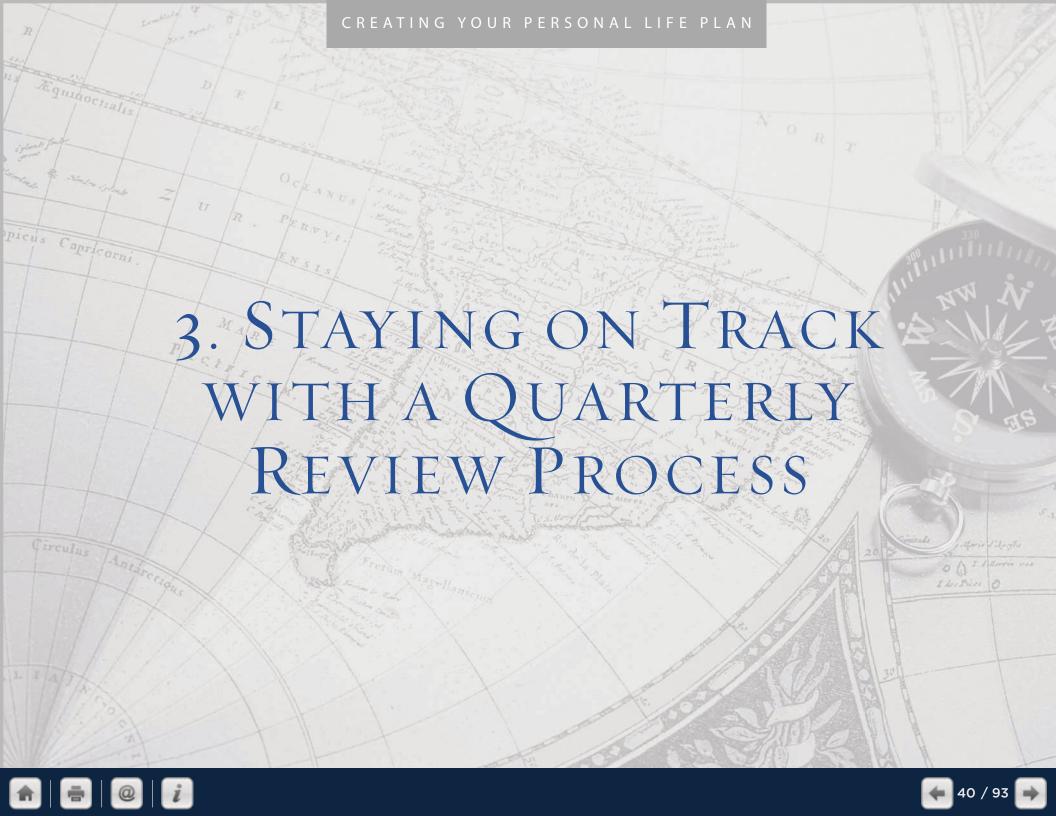
- 7. **Review project lists.** When an action consists of many sub-actions, it qualifies as a project. Here I review my major projects and consider the next action required to keep the ball rolling.
- 8. **Review Someday/Maybe lists.** These are items that don't require immediate action but would be nice to do someday in the future. If I'm ready to move on one of these, I change the category and enter it into the appropriate action list.
- 9. **Review My Life Plan**. This is where I formally read back through my Life Plan, looking for items I need to shore up or actions I can take to move the ball forward. Keep in mind that this document is only five pages long, so it really doesn't take long to read through it. The value is that it gives me a high-level view, so I don't lose touch with what matters most.

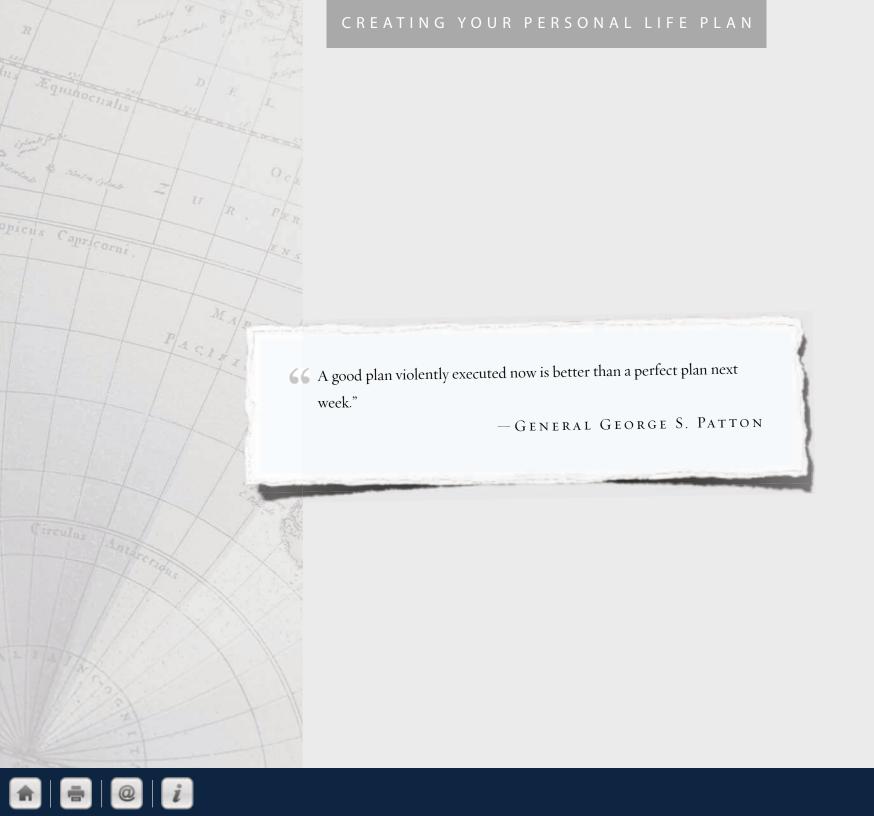
David Allen has a few other items on his agenda (see pp. 185–187), but these are the ones that I find most helpful.











As you can see from the previous section, I believe that:

THE SECRET TO STAYING ON TOP OF YOUR PRIORITIES IS TO SCHEDULE REGULAR TIMES FOR REVIEW AND REFLECTION.

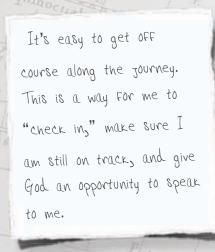
You need to assess where you've come from and where you are going. While you can do this tactically in your Weekly Review, you need to do this in a more in-depth, strategic fashion on a regular basic as well. I do that in my Quarterly Review.

This appointment-with-myself is basically an extended version of the Weekly Review. In the Weekly Review, you climb to the top of the trees and peer at the forest. In the Quarterly review you take a hot air balloon up to a thousand feet or so and see how the forest fits into the overall landscape.

I try to get away from the office for my Quarterly Review. I want to get away from the phones, the drop-in visitors, and the hustle and bustle of office life.

I generally check into an inexpensive hotel immediately after lunch and arrange to stay for twenty-four hours. In the past, when I couldn't afford even a cheap hotel, I would do this in a library, a friend's cabin, or even on a camp out. It doesn't have to be fancy, just relatively private and quiet.

I follow a simple agenda.



- 1. **Spend time praying**. Yes, I do this on a daily basis, but this is different. I want to take time to give thanks for all the things that have happened over the last 90 days. I want to pray about the big issues that I am facing. And, perhaps, most importantly, I want to reconnect with God and make sure that I am still on-track with His agenda for my life. It's easy to get off course along the journey. This is a way for me to "check in," make sure I am still on track, and give God an opportunity to speak to me.
- **Review my Life Plan.** I begin by reading back through my plan. Then I begin the updating process. I tweak the language in my Purpose Statement and Envisioned Future. In the early days, I would sometimes change Supporting Verses. Most importantly, I completely re-assess my Current Realities and draft Specific Commitments. I try to do this as though it were my first time through the Life Planning exercise.
- **Review my Business Vision.** Again, it's easy to get lost in strategies and operational detail. However, my Quarterly Review is an opportunity to reconnect with my Business Vision. What am I building toward? What does the business look like in five years? Note that I don't create my vision during this time; I have already done that previously. During this time I simply want to review the written document, try to visualize it, and make sure I am crystal clear—to the extent possible—on where I am going.
- 4. Write goals for the upcoming quarter. Now I start writing. I have also written about this on my blog. I want to take the review of my Life Plan and my Business Vision and translate it into specific, 90-day objectives. I don't want a long list of to-do items. That's too tactical for this exercise. Instead, I want a short list of the 5–7 most important things I can do in the next quarter to move toward my personal and professional vision. I maintain two lists: one for my personal life and one for my professional life. I put one set on the front of a 3" x 5" card and the other set on the back.







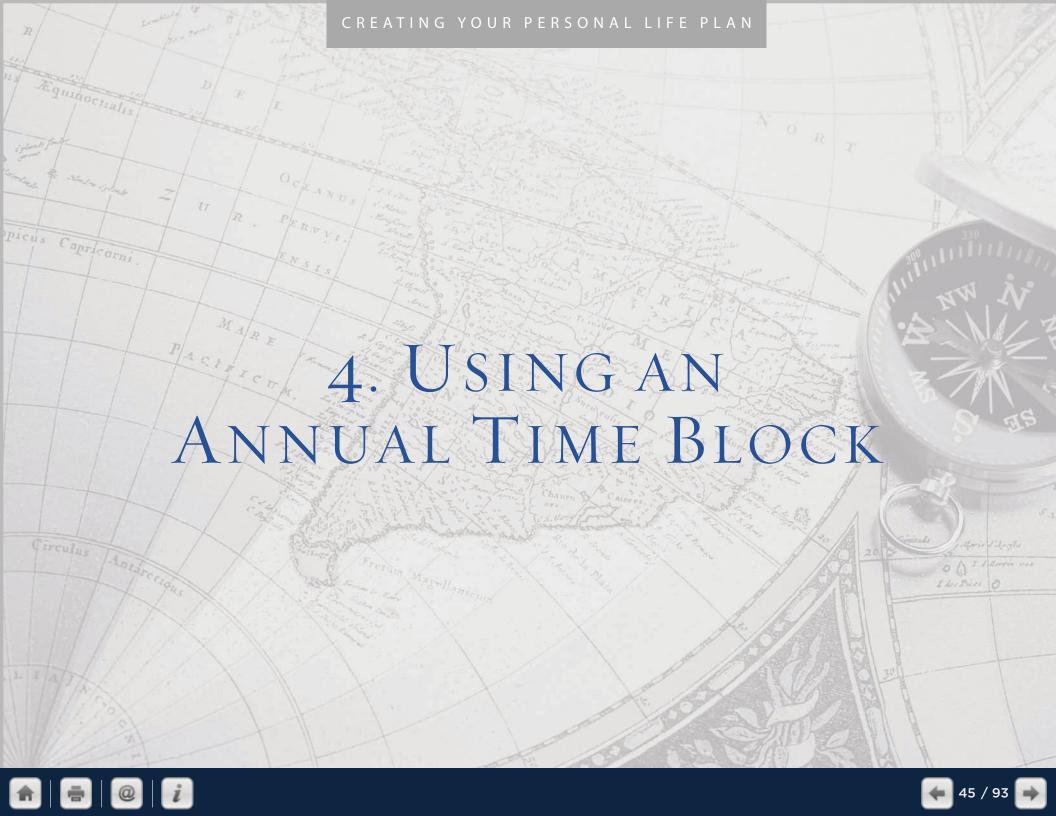




5. **Work on high impact projects.** I can usually go through the above exercise in about four hours. Assuming eight hours of sleep, that leaves me with another eight hours to work on really important, high impact projects. These are the ones that are difficult to get to and do well in the midst of everything else. I usually come into the Quarterly Review with a specific prioritized list of these. It's amazing how much progress you can make when you're alone *without* the usual distractions.

If you want to start doing a Quarterly Review, I strongly suggest that you schedule these far, far in advance. Mine are scheduled two years out. If you wait until you have a break in your schedule, you'll never get to it. You have to make appointments with yourself and schedule other things around it. This is the key to proactive, self-management.





66 The man without a purpose is like a ship without a rudder—a waif, a nothing, a no man. Have a purpose in life, and, having it, throw such strength of mind and muscle into your work as God has given you."

-THOMAS CARLYLE



Stephen Covey tells the story in *First Things First* of attending a seminar, in which the instructor pulled out a wide-mouth gallon jar. He sat it on the table next to some fist-sized rocks.



'How many of these rocks do you think we can get in the jar?' he asked.

"The students made various guesses. The instructor then proceeded to fill the jar with the rocks. It looked like it was full. He asked the class, 'Is this jar full?' Everyone looked at the jar and agreed that it was indeed full.

"He then reached under the table and pulled out a bucket of gravel. He then dumped the gravel into the jar. The gravel went in between all the little places left by the big rocks.

"Then he grinned and once more asked, 'Is the jar full?' By this time, the class was on to him. 'Probably not,' several of the students said.

"Good!' he replied. He reached under the table and brought out a bucket of sand. He poured it into the jar. It went into all the spaces left by the big rocks and the gravel. Again, he asked the class, 'Is this jar full?'

"No,' the class shouted.

"He said, 'Good!' He then grabbed a pitcher of water and poured almost a quart of water into the jar. Then he said, 'What's the point?'

"Someone said, 'If you really work at it, you can always squeeze more stuff into your life."

"No,' the instructor responded. 'That's not the point. The point is this: if you hadn't put these big rocks in first, would you ever have gotten any of them in?" 6

I would make an additional point:

The big rocks are a metaphor for the important stuff. If you don't make room for the important stuff, it will be overwhelmed by the less important stuff.

With this in mind, I plan out my life three years in advance. I am not talking about all the little details. My life is too dynamic for that to work. (Plus I always want to be sensitive to God's leading in the moment.) But I wanted to make sure that I schedule the most important things, so that I am not overwhelmed by the urgent.

I use an Annual Time Block to "put the big rocks" into my calendar for the next three years. Unfortunately, when I started, I didn't have a good tool to do this with.

What I really wanted to see was the whole year at a glance. Unfortunately, neither iCal, Outlook, nor Google Calendar offers this kind of view. The most you can see is a one-month view.

6. Stephen Covey, First Things First (New York: Simon & Schuster, 1994), 89.



So, I created an Annual Time Block Tool in Excel. I have included my own calendar as an example with a blank sheet, which you can copy. You can enter the year you want to schedule in cell A5, and the calendar will automatically recalculate. It even takes into account leap years.

I usually update this calendar in the week between Christmas and New Years. I begin by scheduling the most non-discretionary things and moving to the most discretionary things.

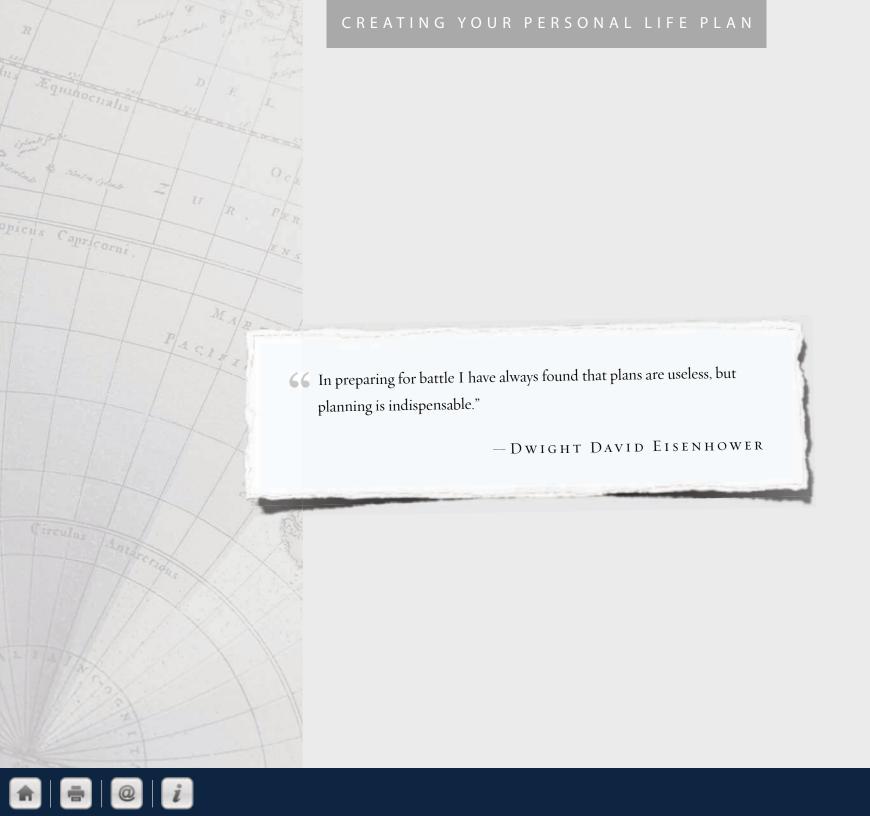
So I scheduled in this order:

- 1. Birthdays and Anniversaries
- 2. Company Holidays
- 3. Church Holidays
- 4. Industry Events
- 5. Vacations
- 6. Board Meetings
- 7. Business Review Meetings
- 8. Special Trips
- 9. Time with Friends

Your list may differ. The issue is to grab the dates while you can before someone else does. Frankly, I would rather have other people plan around my priorities than be forced to plan around theirs. Remember: If you don't have a plan for your life, someone else does.

The key is balance. Make sure you schedule time for the things that are important to you. If you don't, you will find yourself scrambling to find time for the things that are important. If you are not careful, you will wake up one day and discover that you have spent your life living for other people's priorities.





Recently, I attended the funeral of a dear friend from church. Jim died relatively young, but he had lived well. The church was packed. The service was a combination of sadness—mostly for ourselves—and joy. We rejoiced in the fact that we had been given the privilege of knowing this amazing man.

In the few days between Jim's death and his funeral, I spoke with many people about their fondest memories of him. I don't know if he had a formal Life Plan. I suspect that he didn't. Still, the testimony of his family and friends provided proof that he had lived his life *on purpose*, finding time for the things that matter most.

It's indeed possible to live well without a Life Plan, just as you can find your way to a destination without a map. But it is easier with a plan, and you are more likely to enjoy the journey.

In the pages that follow, I have provided a set of Resources and Worksheets for you to get started on your plan. It is my prayer that you will live your life on purpose, finishing your days with no regrets.







These are a few of the resources I have found most helpful in creating a Life Plan and living a more intentional life.

- Andy Andrews, *The Traveler's Gift: Seven Decisions that Determine Personal Success* (Nashville: Thomas Nelson, 2005)
- ▶ Stephen Covey, *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change* (New York: Free Press, Revised Edition, 2004)
- Stephen Covey, First Things First (New York: Simon & Schuster, 1994)
- John Eldredge, *Desire: The Journey We Must Take to Find the Life God Offers* (Nashville: Thomas Nelson, 2007)
- ▶ Michael Gerber, The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It (New York: HarperCollins, 1995)
- Daniel Harkavy, Becoming a Coaching Leader: The Proven Strategy for Building Your Own Team of Champions (Nashville: Thomas Nelson, 2007)
- Max Lucado, *Cure for the Common Life: Living in Your Sweet Spot* (Nashville: Thomas Nelson, 2006)
- John C. Maxwell, Put Your Dream to the Test: 10 Questions that Will Help You See It and Seize It (Nashville: Thomas Nelson, 2009)





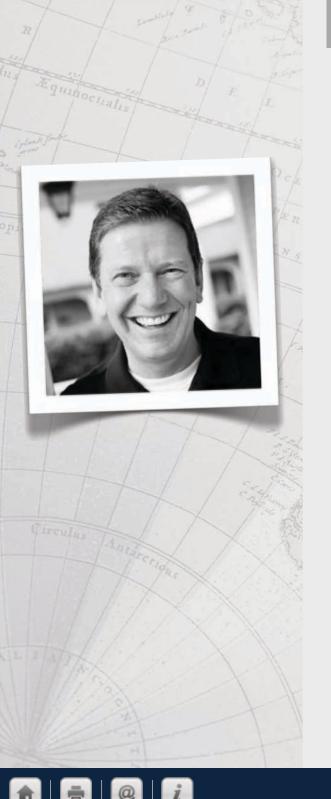


- Donald Miller, A Million Miles in a Thousand Years: How I Learned to Live a Better Story (Nashville, Thomas Nelson, 2011)
- Eugene O'Kelly, Chasing Daylight: How My Forthcoming Death Transformed My Life (New York: McGraw-Hill, 2007)
- Tom Paterson, Living the Life You Were Meant to Live (Nashville: Thomas Nelson, 2003)
- Dave Ramsey, *The Total Money Makeover* (Nashville: Thomas Nelson, 2009)
- Andy Stanley, *The Principle of the Path* (Nashville: Thomas Nelson, 2009)

If you want to take your life planning to the next level, I suggest that you consider using an executive coach from Building Champions. I have used them for years and can't recommend them highly enough.







Michael Hyatt is the Chairman and Chief Executive Officer of Thomas Nelson Publishers. He has been involved in the publishing industry for more than thirty years. Prior to becoming the CEO of Thomas Nelson, he served in a variety of roles within the publishing industry, primarily in editorial and marketing. He also served as a literary agent for several years.

He has also written four books, one of which landed on the *New York Times* bestseller list where it stayed for seven months. He a popular blogger and social media practitioner.

He and his wife, Gail, have been married for more than thirty-two years and have five daughters.



CONTACT

You can connect with Michael here. Just click on the button or the link below:



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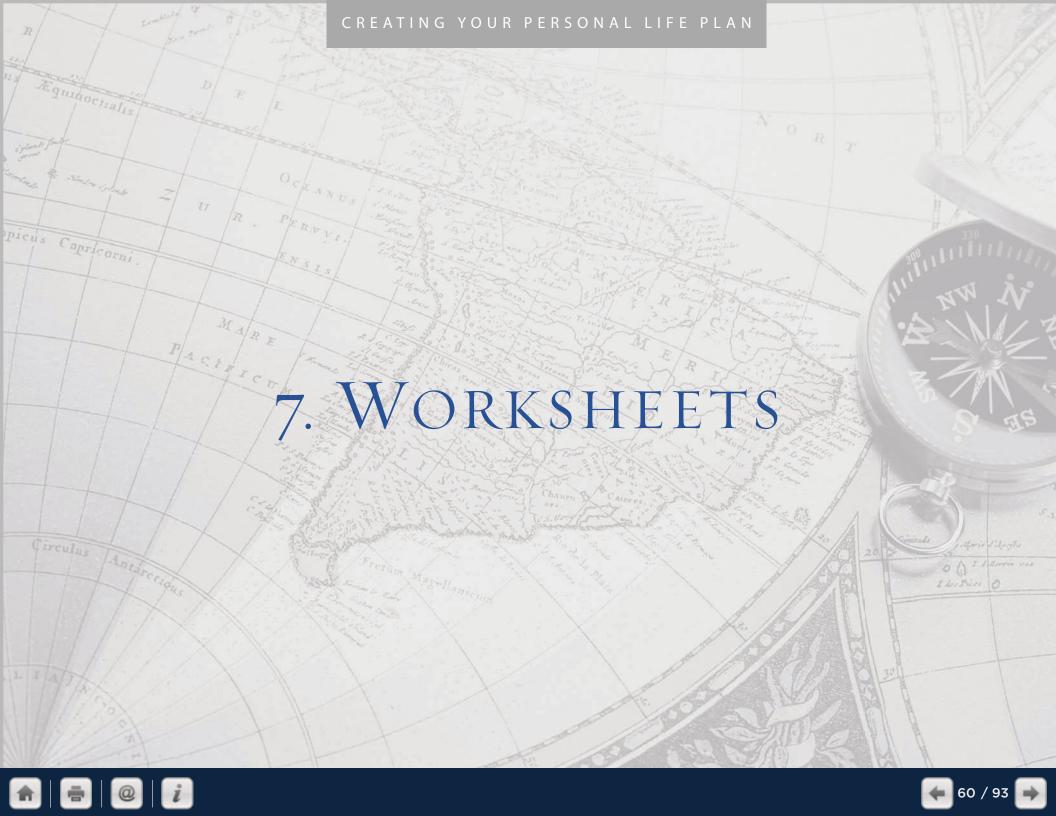
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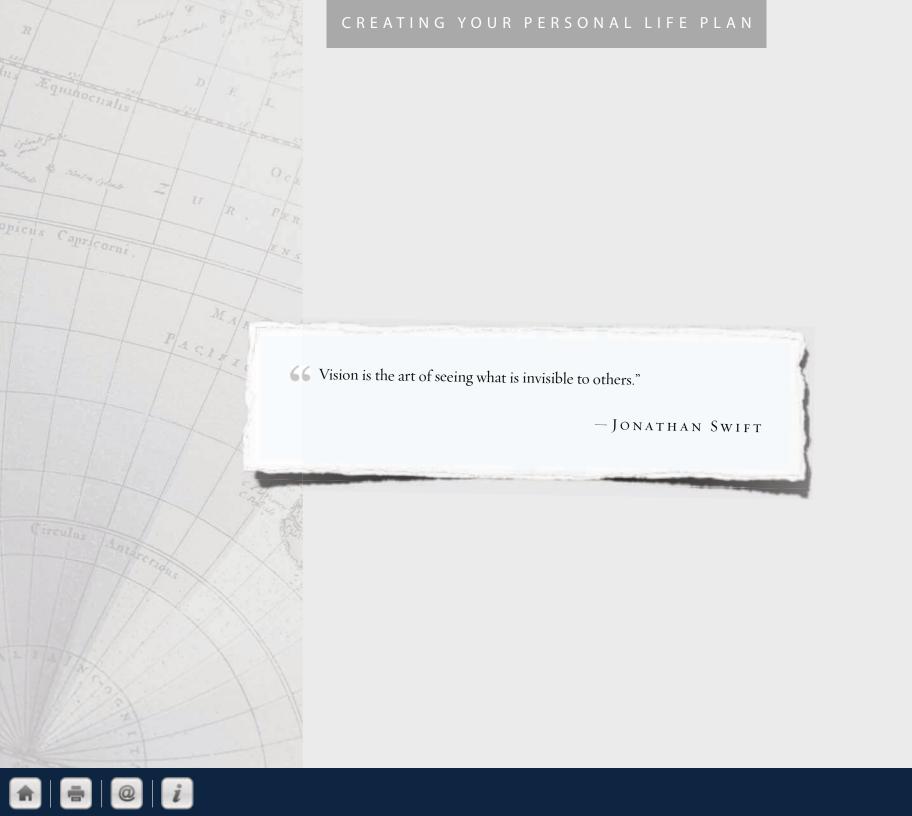
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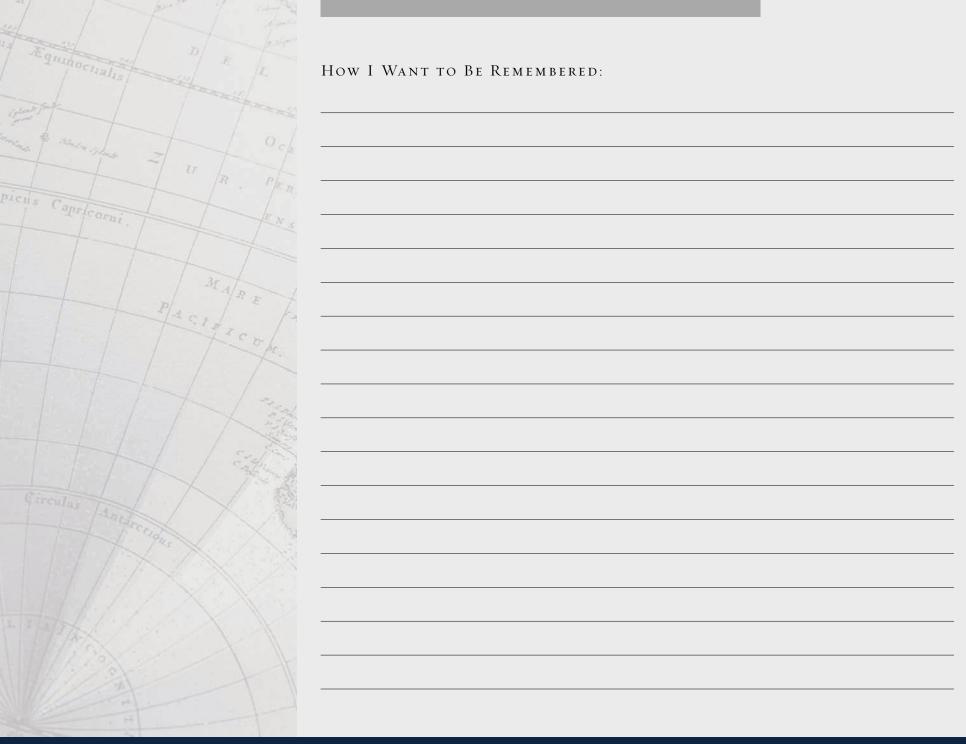






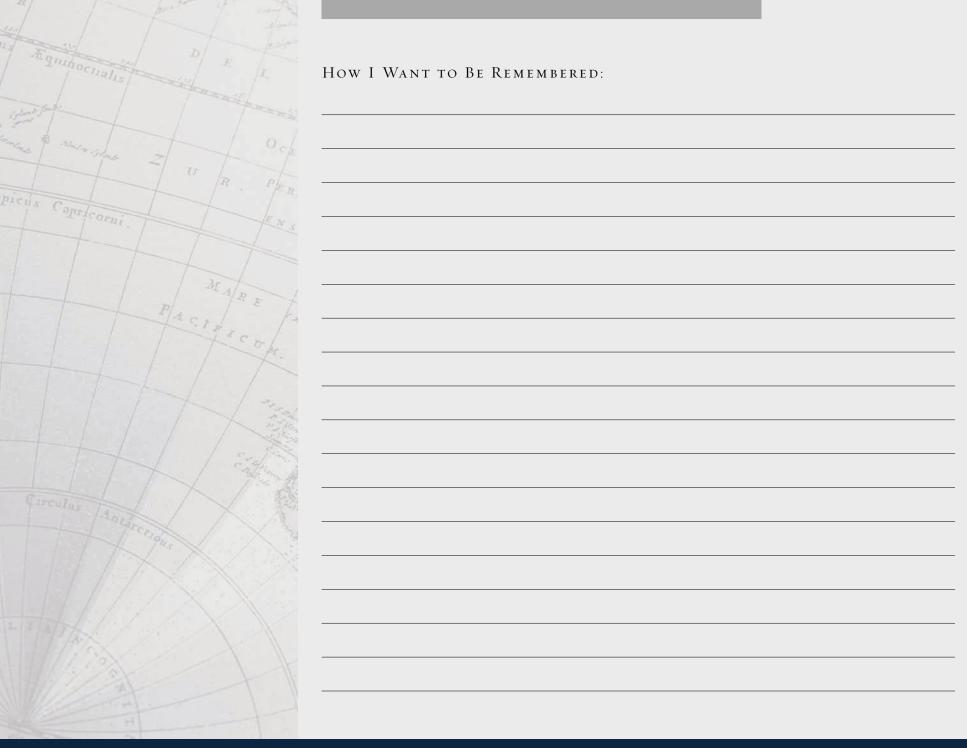






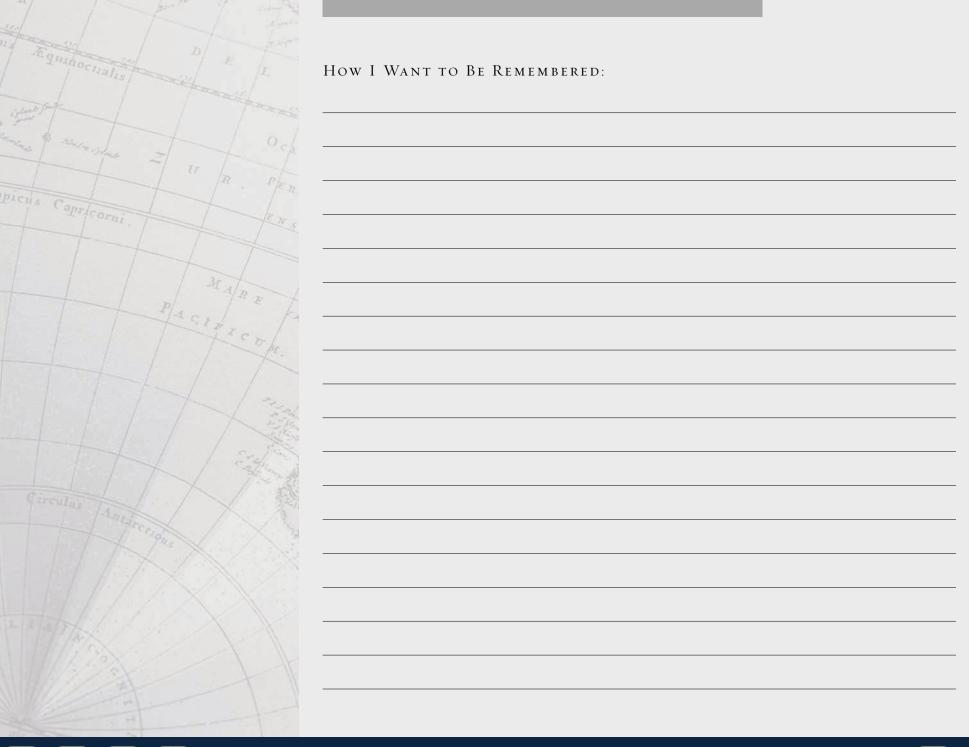




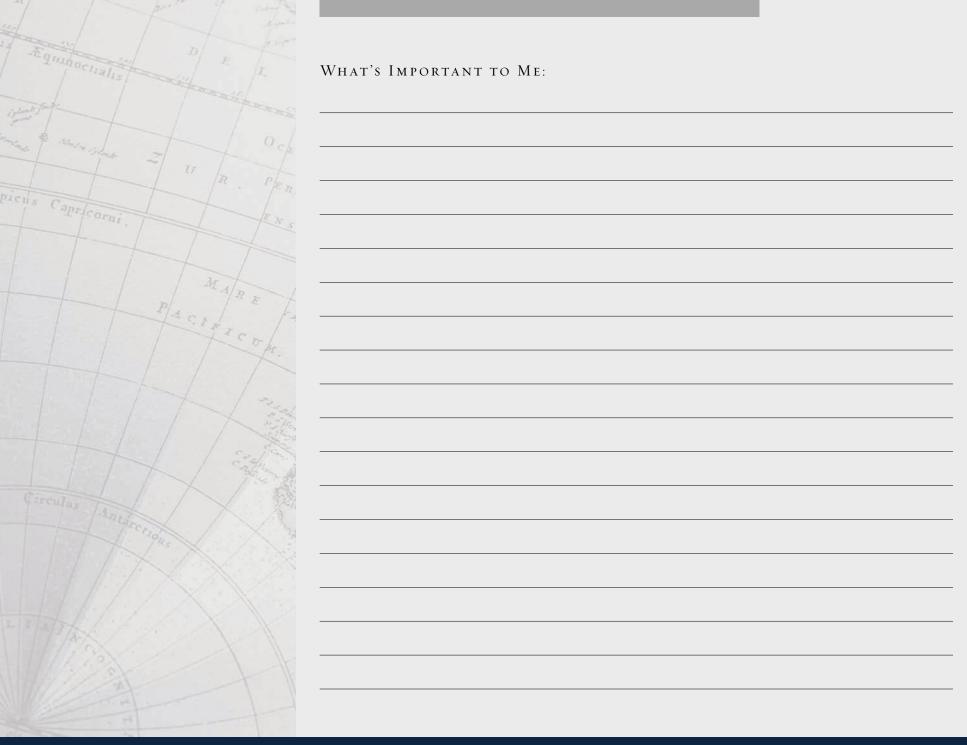
















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Purpose Statement:
Envisioned Future:
Supporting Verse:







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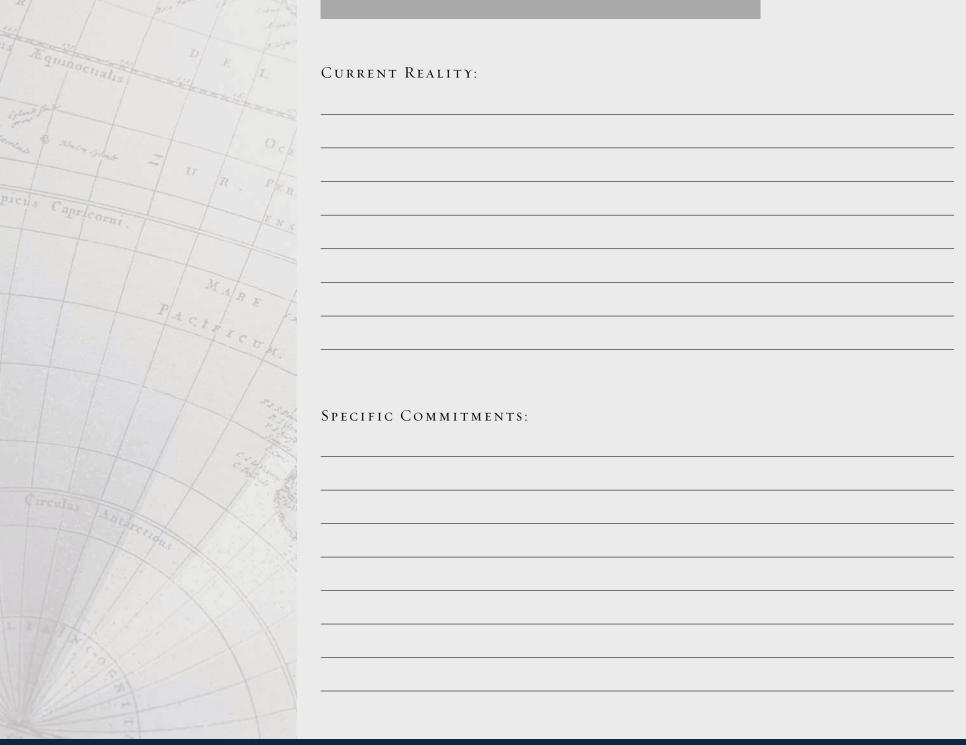






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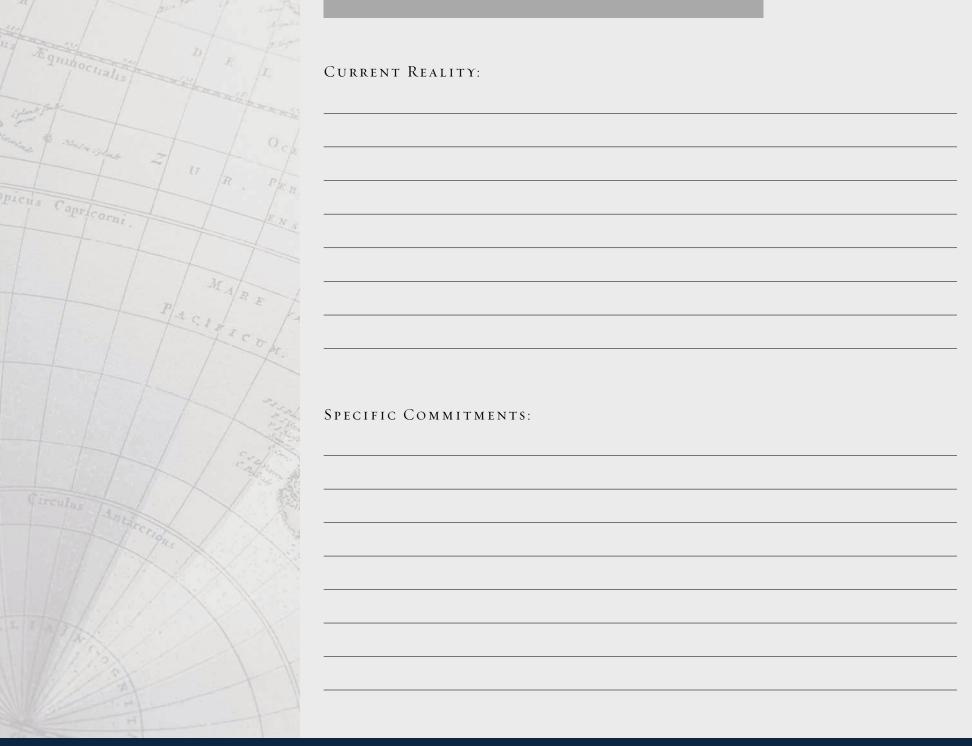








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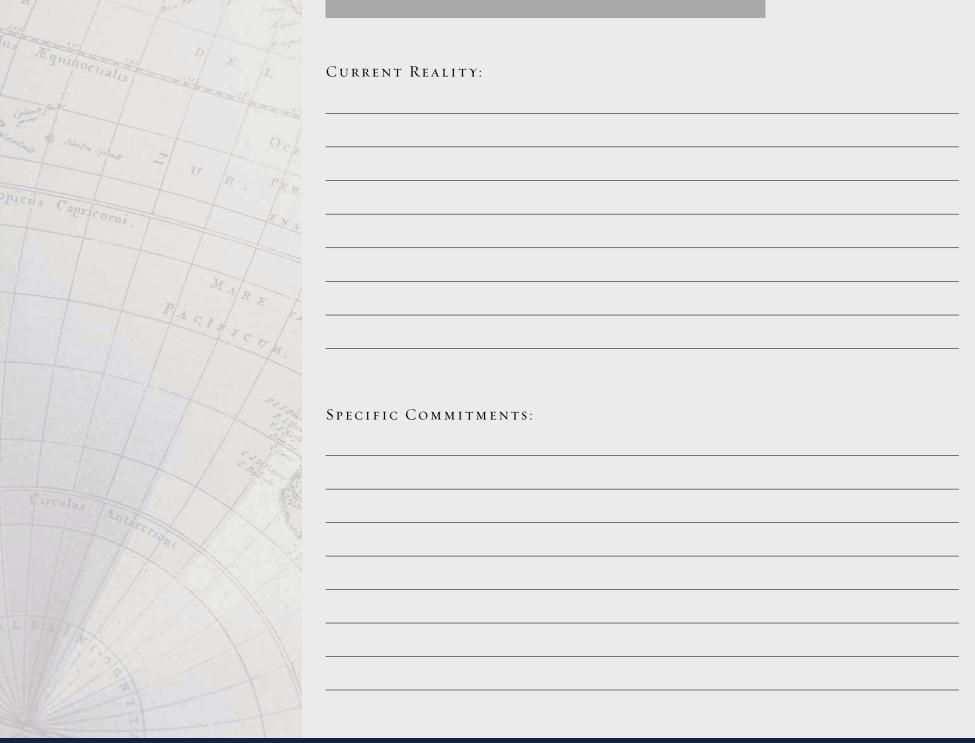
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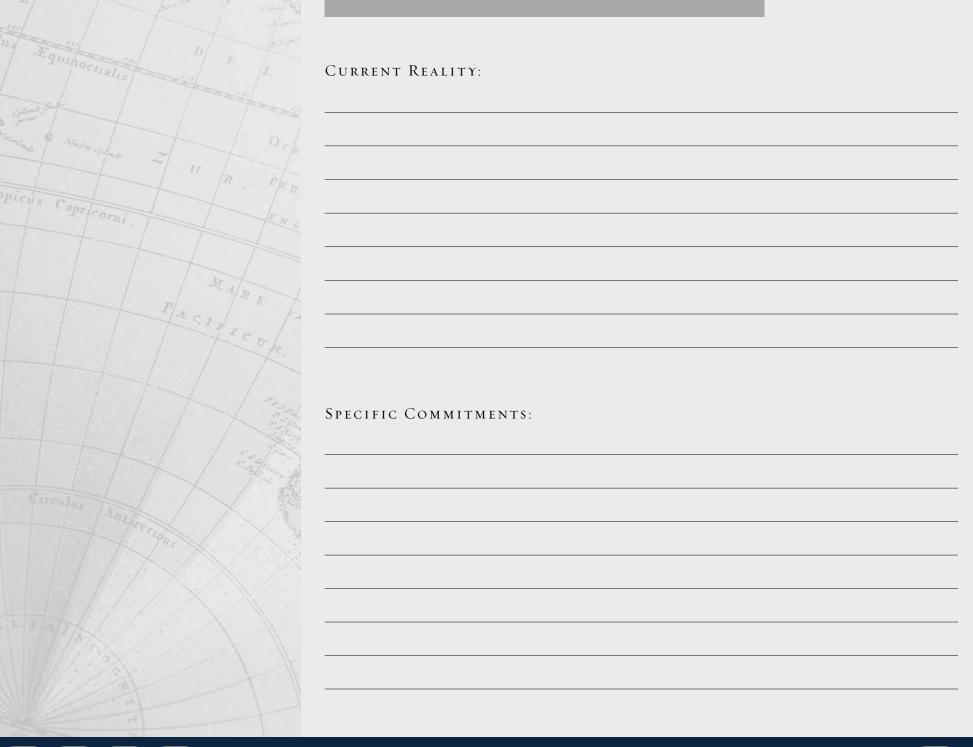
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ACCOUNT NAME:
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Envisioned Future:
SUPPORTING VERSE:















"Many people talk about the importance of having a plan for your life, but no one could really tell you how to create one. Until now. In this **ONE-OF-A-KIND** e-book, Michael Hyatt explains *exactly* how to create a life plan. It will equip you to live your live on purpose, achieving what matters most in every aspect of your life."

- JOHN C. MAXWELL

New York Times Bestselling Author Founder, The John Maxwell Company "Lives that are lived on purpose and with purpose are rich lives. Michael Hyatt has done a great job of laying the track to run on that allows you to accomplish both. This book is A MUST READ full of reminders and revelation that will open up your mind and organize your time."

- DAVE RAMSEY

New York Times Bestselling Author Author of *The Total Money Make Over*

"Michael Hyatt has much to teach us. In a world of random, often directionless lives, his life stands out as an example of a career wellchosen, time well-used, and passion deeply-heeded. Thank you, Michael, for taking time to record the lessons you've learned. May we learn from them the power living **ON PURPOSE**.

- MAX LUCADO

New York Times Bestselling Author Author of Fearless and Outlive Your Life "With Creating Your Personal Life Plan, Michael Hyatt has fired A LASER BEAM OF FOCUS into a world of uncertainty. Finally, a brightly lit, well-marked pathway for the person who desires true and lasting success!"

- ANDY ANDREWS

New York Times Bestselling Author The Traveler's Gift, The Noticer, and The Final Summit









Michael's e-book is brilliant. Discovering your purpose and acting on it is crucial to becoming who God created you to be. Creating Your Personal Life Plan is **POWER-PACKED**, simple-to-follow and has the potential to be life-changing!"

- CRAIG GROESCHEL

Pastor, LifeChurch.TV Author, Weird: Because Normal Isn't Working "Everybody ends up somewhere in life. Blessed are those who end up somewhere on purpose! If you lean toward the purpose side of the equation, then I would highly recommend Michael Hyatt's brand new e-book, Creating Your Personal Life Plan. In this easy to follow, step-bystep guide, Michael provides us with a planning template that is both THOROUGH AND EMPOWERING."

- ANDY STANLEY

Senior Paster, North Point Community Church Author of *The Principle of the Path* and *Next Generation Leader*

"Here's the test of any message: Does the author practice what he preaches? Is he the real deal? I can say with confidence that Michael Hyatt is **THE REAL DEAL**. I've seen him live this for years with integrity. So, he has earned the right to speak, and we'll all benefit from listening!"

- JOHN ELDREDGE

New York Times Bestselling Author Author of Wild at Heart and Beautiful Outlaw

"Both **PRACTICAL AND INSPIRING**, Michael Hyatt makes a life plan seem not only doable, but inviting. While providing clear instruction, he sets us on an enjoyable, rewarding path. With very clear principles, he shows us how to hitch our wagon to a star while keeping our feet on the ground."

- MARY GRAHAM

President, Women of Faith









"Contrary to popular belief, great things almost never happen by accident. Great accomplishments are planned. Sadly, much of the planning we do goes into accomplishments that leave us feeling empty in the end. Michael Hyatt's Creating Your Personal Life Plan is about making sure that doesn't happen. I know of very few people who have accomplished as much as Michael has—and survived to enjoy their achievements. He has not only survived; he's flourished. This is A PLAN I CAN GET BEHIND and intend to follow myself."

- DONALD MILLER

New York Times Bestselling Author Author of Blue Like Jazz and A Million Miles in a Thousand Years

"I love it! This is a valuable tool that I am utilizing immediately. It is lifechanging but **SIMPLE TO IMPLEMENT**. I've planned all of my life but this brings my priorities into focus and keeps me in present day reality while my gaze is on the future. Thanks, Michael, for a fun and creative e-book! This is going to help a lot of people who just need a little structure to conquer their world and succeed."

- STEVE ARTERBURN

New York Times Bestselling Author

"What an honor to endorse this book by Michael Hyatt. Being one who has loved planning all my life, I can tell you from experience, his practical and applicable advice hits the nail on the head. If you've been wondering where to go on life's journey, this is **THE ROAD MAP** you need. Not only will it take you to your desired destination, you'll find lots of encouragement along the way."

- LUCI SWINDOLL

Bestselling Author Women of Faith Speaker

"I wish my husband Les and I had known these things years ago. We have stumbled our way to where we are at, a bit battered and bruised from the journey—and its not over yet. We are definitely going to implement Michael's strategy. It WILL MAKE A DIFFERENCE."

- PATSY CLAIRMONT

Bestselling Author Women of Faith Speaker





"Creating Your Personal Life Plan is **ESSENTIAL FOR LEADERS** who want to get better, be purposeful, and make a difference. And Michael Hyatt provides a comprehensive yet simple guide for doing just that. Understanding how best to accomplish your life mission takes work, and practical tools like this make it much easier to reach the finish line joyfully on purpose."

- BRAD LOMENICK

Executive Director, Catalyst

"If you aim at nothing three things happen: You will hit it every time, any road will get you there, however you will never know when you have arrived. How tragic to spend a life with no purpose or end in mind. Michael Hyatt's new book, Creating Your Personal Life Plan, is A GREAT TOOL to either get you started down the right road or to make sure you are still on that road." I recommend it highly both for its content but also because it is written by a man who lives productively because he lives purposely."

- RON BLUE

President, Kingdom Advisors

"I am crazy about Michael Hyatt but totally bored with the topic of planning. However, his new e-book twirled me around. It is **COMPELLING AND CLEAR.** It actually makes me feel I not only can become a successful 'plan-person,' I may even want to!"

MARILYN MEBERG

Bestselling Author Women of Faith Speaker "For years, I've thought to myself, How does Michael Hyatt do it? From the wildly successful blog to leading Thomas Nelson to pouring into a family he loves, I've long wondered how he manages to do all the things he does. This book is **THE ANSWER**. It's practical, it's personal and it's something I am putting to use in my own life."

- JON ACUFF

Author of the book and blog, Stuff Christians Like and Quitter: Closing the Gap Between Your Day Job & Your Dream Job





"Michael Hyatt's e-book, *Creating Your Personal Life Plan,* is **A PERSONAL GPS** you can't do without. It helps you choose a destination, avoid wrong turns, and recalculate when you run into obstacles. You will be lost without it."

- KEN DAVIS

Comedian and Popular Speaker

"If Michael Hyatt writes it, I read it. It's that simple. I do not know of a corporate leader with as much influence and experience as Michael, who is more intentional about investing in people than he is. He lives a personal and professional **LIFE WORTH FOLLOWING**. For those of us who struggle to reach the vision we have set for ourselves, this is a must read e-book!"

- RON EDMONDSON

Pastor, Grace Community Church Clarksville, TN

"As I read *Creating Your Personal Life Plan*, I quickly realized that in order to truly fulfill my lifework, that of 'influencing influencers,' I MUST have not just a plan, but a plan that is written out. Michael has succinctly and clearly outlined the perfect way to make this happen. It is **A TINY BOOK FILLED WITH HUGE RESOURCES.** I have just added an extra two days to my annual personal retreat to utilize this invaluable resource and create my own life plan."

- RANDY ELROD

Popular Blogger and Leader of Re:create

"For anyone who is searching for balance and true success, I highly recommend Michael Hyatt's new book, *Creating Your Personal Life Plan*. This book can be utilized by anyone from the busy executive needing to regain perspective to the college graduate starting a new job. Every page is **FULL OF WISDOM** and advice born from experience."

- SKIP PRICHARD

President & CEO

Ingram Content Group



So many of us go through life unfocused and unable to confidently set the 'big, hairy, audacious' goals that God wants us to pursue.

Thankfully, Michael Hyatt has developed this **UNIQUE AND POWERFUL** planning system to help take us from simply reacting to life; to purposefully and proactively living a rich life of meaning and significance.

- DAN T. CATHY

President & Chief Operating Officer Chick-fil-A, Inc.

"Michael Hyatt's new e-book, Creating Your Personal Life Plan, was written just for me. I'm at a stage in life where I need this kind of guidance in an easy to understand template to help me through the process of giving my life more **FOCUS AND CLARITY**. If you are looking for a great tool to help you achieve your goals in life then read this book and go design the life you've always wanted."

- SPENCE SMITH

Co-Founder of Big Tent Revival
Artist Relations, Compassion International

"I rarely meet people who have a written plan for their life. It's not because they refuse to do so. I believe most of us desire to live intentionally and fully embrace all of what God has for us. I think the challenge is that most people don't know how to create a life plan, or they think the process is too complicated. This is why I highly recommend Michael's new e-book. It takes the daunting task of creating a life plan and breaks it down into MANAGEABLE PIECES."

- JEFF HENDERSON

Campus Pastor, Gwinnett Church
Gwinnett, GA







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