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**SIMPLE
PERSONAL
LIFE PLAN™**

Your #1 Tool for a Life That Matters

Guide and Template

3 Reasons Why Everyone Should Have a Personal Life Plan

Every person should have personal life plan that is reviewed and updated regularly. I wrote my first personal life plan in 2004.

In April 2011, [I completely rewrote mine](#) to be more intentional and increase my effectiveness. I also began working with [Raymond Gleason](#) at [Building Champions](#). These two changes have significantly impacted my life and work. During my life plan review recently, I noted 3 reasons everyone should have a personal life plan...

1. **Understand yourself more fully.** As you develop your plan, you will discover your top priorities in life, a [vision for your future](#), and specific commitments to make that vision become reality. You'll be better prepared to make intentional decisions about your time, energy, and resources.
2. **Live with Purpose.** Your plan will lead you to answer the question: What was I made to do that no one else can do the way that I can? When we can clearly answer this question, life becomes more manageable, and we are able to [grow and lead with purpose](#).
3. **Stay on Track.** Have you ever become frustrated with your circumstances or realized that you no longer enjoy your job? As you regularly review and update your Personal Life Plan, it remains fresh and exciting. These regular reviews encourage you when you are down, help you with priority management and [decision-making](#), and get you back on track [when you get derailed by life](#).

Your Life Matters

If you're like me, you're incredibly busy. I am a husband, father, business leader, [blogger](#), an executive coach, a public speaker, a member of several boards. I'm sure your list of roles is similar.

Many people plan work projects, starting a new business, vacations, entertainment, careers, building a new home. But, sadly, **I've met very few people who have a plan for their life.**

As a result, they come to the realization that a major portion of their life has slipped away. And, discouraged and disillusioned, they try to figure out why they've not been more effective.

We all want our life and work to matter. And I have a conviction that **every person is valuable and every life is worth developing.** In short, your life matters!

Yet the harsh reality is – **HOW you live determines how much your life will matter.** And if my life is going to matter, I've got to be very intentional with how I live it.

Write a plan

So, in 2004, I wrote my first personal life plan. I used it for nearly seven years with minimal results. I knew I had to change – I recently wrote about [why I threw it away](#). If you've never had a life plan, learning from my experience may save you some trouble.

In 2011, I started over – I wrote a new life plan. This experience has resulted in dramatic improvements in my life, in my work, in my home, in my relationships.

Personal Life Plan Accounts

My plan is relatively simple – less than 5 pages. And it's basically a list of top priorities in my life –

1. God
2. Self
3. Sarah
4. Madison
5. Friends
6. Career
7. Ministry
8. Finances

These top priorities became my life plan accounts – areas of my life in which I want to achieve maximum equity.

Account Sections

Each account has five simple sections:

1. Purpose. The clear and concise end result I desire in this account. I answered the question, Why is this account important to me? Here's an example of my career purpose:

My purpose is to be continually engaged in an occupation that best utilizes my gifts and calling to provide for my family needs and broaden my sphere of influence so I can lead as many future leaders as possible toward purposeful growth.

2. Basis. A scripture verse is optional, and it may not be important to you. It was important to me that my life is built on transcendent values that have stood the test of time – so I selected a scripture verse for each life plan account. Here’s my friends verse:

Proverbs 17:17 A friend is always loyal and a brother is born for to help in time of need.

3. Future. Here I visualized, even dreamed about where I wanted to be 20 or 30 years from now in each account. My Future for my daughter, Madison, is:

I want Madison to remember that I loved her “more than anything in the world”, that I understood her, and that I encouraged her to accomplish her dreams. I want her to remember our times together – our dates, riding bikes, taking walks together, talking about business ideas, working together, times I comforted her. I want her to remember that I loved God and loved her mom.

4. Reality. This is where it got challenging – it wasn’t hard; it was just very revealing. I asked myself, Where am I **in relation to my envisioned Future?** How could I improve this area? My current Reality for my relationship with Madison is:

Madison and I are spending regular time together, although I need to spend more uninterrupted time with her each day. Occasionally when we are together my mind is distracted. We are doing a good job with her spending and savings plan. She knows I love her and her mom as is evidenced by the fact that she is seeking me out more to love on me and show affection to me.

5. Actions. I listed 1 to 3 actions that I committed to immediately in order to move from my Reality toward my Future – to build equity in each account. I asked, What specific disciplines will I develop to see immediate improvement in this account – daily, weekly, monthly? The key here was **limiting the specific commitments to 3 or fewer** so that I could accomplish them effectively – you can always add more later. My Actions for my spouse account included:

- *Spend time with Sarah at the end of every day communicating with her with no interruptions. (9:00-10:00pm)*
- *Go on a lunch date with her every Friday at noon. Leave our phones in the car.*
- *Take her on two weekend getaways each year – one before May 30 and the other before November 30. Unplug from technology.*

Life doesn’t come with a road map – and there’s no universal list of pros and cons for your path in life. You must simply **find what you were made to do and commit to it – no matter what.**

A life plan helps you do that by regularly bringing you back to what’s most important. So, **start the adventure today!** And experience the power of living and growing on purpose.

3 Tips for Personal Life Planning Most People Miss

Over the past 15 years, [we've coached hundreds of people](#) through personal and business planning. Nearly every week I am reminded that I am privileged to work with so many remarkably talented people. Yet even these high-performing leaders face day-to-day challenges that threaten the well-being of their life and work relationships.

I recently spent some time thinking about the hurdles that trip up nearly everyone as they work through a personal life plan.

I want you to be effective. I want you to be successful. So here are 3 Tips for Personal Life Planning Most People Miss...

1. Schedule a day to get away

The first time I tried to write out my personal life plan, I tried to work on it at work – in my office. I made some progress but it was slow. So I decided I would work on it at home. That didn't work either. After several weeks, I had made very little progress. It wasn't until I scheduled 2 days away from everyone and everything at a quiet retreat in Central Virginia that I was able to make progress. In fact, I wrote my entire personal life plan during those 2 days away.

Now I plan a day or two away every quarter. You can [read about how a quarterly review can bring dramatic improvements to your life and work](#) and [download my template](#).

A few weeks ago, I spent a couple of days alone at a secluded retreat in southern Oklahoma. These 2 days were huge for me – I spent time relaxing, reflecting, thinking, praying. And I made significant progress in a couple of areas in which my growth had stalled.

You'll find greater focus and clarity when you leave behind the busyness of the office. Getting away is important for me.

You know it's true! So do it! [Plan time away](#). Budget for it. And protect it. If you do, you'll be more successful in your life and work.

2. Keep it simple

Every single one of us struggle here. When we finally [make time to slow down](#), reflect, and get clarity, there comes a point at which ideas begin flooding our minds. So we begin writing down all of these ideas for behaviors and habits can be improved.

Then, 1 of 2 things happens – we either 1) become overwhelmed by the length of the list, or 2) we become determined to fix all of them. Neither will have a good end.

So here are 2 ways to keep that from happening. As you write out specific actions for each personal life plan account...

1. **Include only 1-2 actions per account.** Several years ago a client sent me his life plan to review. For each of his 10 personal life plan accounts he had written 8-15 actions. There was no way he would be able to handle 100-150 action items all at once. So keep it simple. Then...

2. **Focus on one action in one account in which you can make immediate progress.** Resist the urge to tackle several. Do one. When you nail one discipline, you will gain momentum and energy to intentionally address other areas.

3. Be specific

I wrote my first personal life plan in 2004. But in 2011 I completely rewrote it. Because I wasn't making the progress that I wanted to make.

The primary difference between my old personal life plan and my new one was – I got very specific with the actions for each account. In fact, I got so specific, I can now plug the actions right into my calendar.

For example, in my old plan I wrote about my relationship with my wife, Sarah:

I will regularly communicate my unconditional love to her by always thinking of her first, valuing our differences, caring about her feelings, respecting her opinions, sharing my most intimate thoughts, and by expressing appreciation and care.

Sounds pretty good, huh? I'm a romantic!

Now, here are the actions I identified for Sarah in my new personal life plan:

Spend time with Sarah at the end of every day communicating with her with no interruptions. (9:00-10:00 pm)

Go on a lunch date with her every Friday at noon. Leave our phones in the car.

Take her on two weekend getaways each year – one before May 30 and the other before November 30. Unplug from technology.

What's the difference?

I got WAY more specific.

Guess which one has had better results! Yep – the new one! Here's why...

Raymond Gleason, executive coach at [Building Champions](#), once told me – Specificity produces accountability. And accountability yields more consistent results.

So if you're working yourself to death and still not getting the results that you anticipated, then you're probably not being specific enough.

To get better results, get more specific. Get more specific with what you want to accomplish. Get more specific with when you want to accomplish it. Get more specific with how you're going to do it. Get more specific about the help you need. Get more specific with who you need help from.

Break the action down into smaller pieces. Assign specific time on your calendar. Whatever the action is – GET MORE SPECIFIC!

When you do, you'll be far more successful in your life and work! These 3 tips will help you avoid the most common pitfalls in life planning.

The Most Important Part

For your plan to work, you must [commit to reviewing the plan weekly](#) and using it to guide HOW you invest your time and HOW you make decisions.

I have an appointment on my calendar every Thursday at 9 am to review my plan. It's the only way that I can stay on track. If I'm not reviewing them, something else will come along and grab my attention. And I may never get back on track.

Do you remember a time when that happened to you?

Like most people, I really struggle with staying on track. I'm easily distracted – by entertainment, by sports, by mindless activities like social media. And if I'm not intentional and purposeful about my life and work, weeks, months, and years slip by and I find myself no closer to my envisioned future.

For example, I've learned that it's very important for me to spend one-on-one time with those who directly report to me. In my role, some of these people are paid staff and many of them are volunteers. But, because these meetings require so much time to prepare for them, I have struggled to hold them regularly.

If I am not connecting with them on a regular basis, there is going to be trouble. Lots of it. Because I can't do everything myself.

So I recently contacted all of my key leaders and apologized. Then I scheduled a regular time to connect with each one of them.

So, set a day and time every week to review your personal life plan. It doesn't take long – maybe 20 to 30 minutes – but it makes a huge difference. Because you are reconnecting with what's most important to you and to your work.

Your NEW *Personal Life Plan* can guide you to extraordinary growth in your life and work.

Bonus - Free Book

If you are going to successfully write a Business Plan, you'll need to first be clear on vision. My book, [Creating Your Business Vision](#), is a step-by-step guide for designing the work you've always wanted to do. It's less a book and more an experience that introduces you to:

1. The story of a struggling leader and how to find clarity on what matters most in your work.
2. And, a four-step process for identifying where you are NOW, and how to get from there to where you want to be.

You can [read more about how vision impacts your business plan here](#).

If you haven't already, [download a free PDF copy of the book today](#). Or **get a copy from your favorite retailer** – [Amazon](#), [Kindle](#), [Barnes & Noble](#), or [Nook](#).

How to complete your *SIMPLE Personal Life Plan*

1. Save this document to your computer
2. Re-open the document
3. Type directly into the template, save, and print your *SIMPLE Personal Life Plan*.

How to Use the Template

Write your responses to the questions in the space provided. Once you complete the guide you may also want to type your *SIMPLE Personal Life Plan* document.

Once you complete it, print it out and review it daily for the first 90 days. Place it somewhere you will see it daily. After the first 90 days, you should review it weekly.

Notes

Your actions may need to be revised to be more detailed or less detailed as you make progress in these areas. When you feel like you're struggling in a particular area or several areas - that's normal. Set aside some time to come back to your *SIMPLE Personal Life Plan*. Review it. Get reset. Then move forward again.

Investing the time today in your *SIMPLE Personal Life Plan* will bring dramatic improvements to your life, work, and relationships. It will significantly increase your chances for successfully achieving your personal and professional goals.

Here we go - it's time to complete your *SIMPLE Personal Life Plan*!

Name _____

Date _____

Who is there?

Who do you expect to attend your funeral? Who are these most important people in your life? This could be individuals or groups of people – children, spouse, friends, colleagues, friends, etc.?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

What will they say?

List each person and what would you like for them to say about you at your funeral? What do they remember most about you? What impact did your life have? What have they lost with your passing?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Who is most important?

List the relationships you noted above and answer the following...

Relationship	How could this relationship be improved?	What has to happen in order for this relationship to better?
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Priorities

What is most important to me?

1. Think of the areas of your life that are most important to you and list them below (i.e. spirituality, children, finance, self-development, friends, fun, ministry, spouse, health, career, family, vacation, charity, etc.).
2. Number them in order of priority.
3. Assess where you are currently in each account using a 1 to 10 scale (1 is strongly lacking and 10 is totally fulfilled in this area).

SIMPLE Personal Life Plan Account	Priority	Where am I now?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Now, use the following forms to complete your *SIMPLE Personal Life Plan*. Keep in mind that you will complete one form for each *SIMPLE Personal Life Plan* account listed above.

SIMPLE Personal Life Plan Account

Account _____

Future

Visualize, dream, clarify where you want to be 20 or 30 years from now in this account. Write it like you would write a story that describes a day in your life - in your future. What do you see when you look into the future for this account?

Purpose

Now, based on the future you just described, define your purpose for this account - the clear and concise end result you desire in this account. Why is this account important to you? Keep it simple. One sentence. This must be a purpose you can fully embrace. Start with, "My purpose is to..."

My Purpose is to

Basis

A universal principle of scripture verse is optional, of course. While it may not seem important to you, it is important to some who want their life to be built on transcendent values that have stood the test of time.

Reality

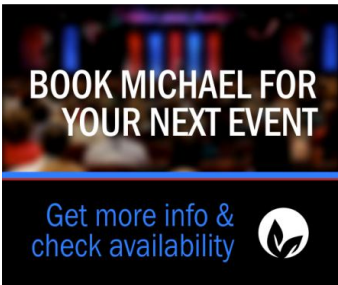
Now it's time to be brutally honest with yourself. Where are you in relationship to your Future? How could this area improve? Don't pull any punches. The more honest you can be, the more progress you will see. Try to write down the first things that come to mind without too much analysis.

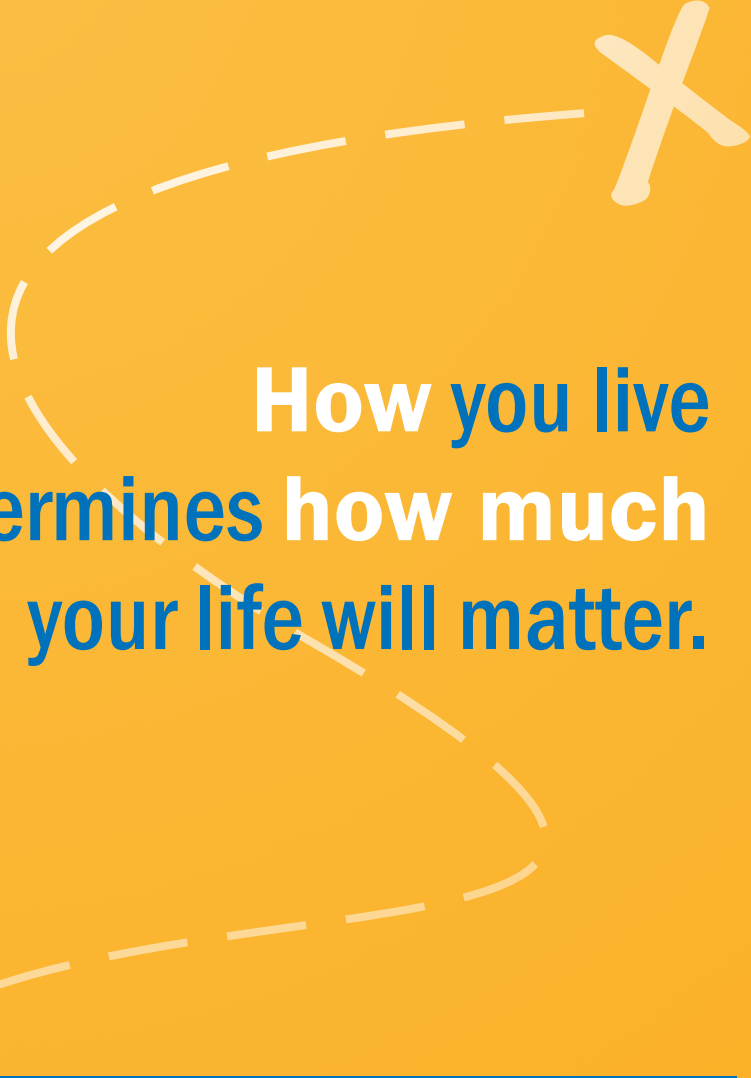
Actions

List 2 to 3 actions that you must commit to immediately to move from your Reality to your Future – to build equity in this account. What specific disciplines will you do to see immediate improvement in this account – daily, weekly, monthly? It is important that you limit your Actions to no more than 3. These disciplines should be so brutally specific that you can enter them into your calendar on a specific day at a specific time.

Once you complete the form for this Account, reorder the items in this order:
Purpose, Basis, Future, Reality, Actions.

Notes for my SIMPLE Personal Life Plan





**How you live
determines how much
your life will matter.**



MICHAEL NICHOLS has led consistent growth in companies, colleges and universities, and non-profits for more than 25 years. Michael is a Partner at GiANT Worldwide and has served as Chairman and CEO of an international marketing firm, executive consultant, and university and non-profit executive. He is the author of *One-on-One Meetings that Work* and *Creating Your Business Vision* and has a Doctor of Education degree in Organizational Leadership.

Michael helps leaders and organizations with healthy culture, leader development, strategic planning, process development, and life and work balance. He speaks internationally at conferences, organizations, and on university campuses on a variety of topics, including Leader Development, Team Leadership, and Organizational Growth.