

DEVELOPING YOUR LIFE/BUSINESS PLAN

THE QUALITY OF THE LIFE YOU ARE LIVING TODAY IS IN
DIRECT PROPORTION TO THE CHOICES YOU MADE IN THE PAST
AND THE CHOICES YOU MAKE TODAY
WILL DETERMINE YOUR FUTURE



Welcome!

We acknowledge your decision to attend a Lifeline Coaching and Education, Inc. event. Our deepest intention is that you receive full benefit from the information in this seminar and experience great success in your life and business!

DEVELOPING YOUR LIFE / BUSINESS PLAN

IT IS WHEN WE CAREFULLY PLAN AND THEN ACT ON OUR PLANS THAT WE MOST OFTEN MANIFEST OUR INTENTIONS

Framework: The 5 Elements of the Plan

1. DREAM/VISION LIST

An itemized list of what you desire to achieve, experience, have.

2. INTENTIONS LIST

A list of specific results you intend to accomplish in your personal life as well as your professional life during the next 12 months.

3. VALUES LIST

A prioritized list of what you believe is most important to you in order for you to be fulfilled.

4. ACTION PLAN/PRINCIPLE-CENTERED CHOICES

A list of the objectives or steps you must take in order to achieve each of your intentions.

5. DAILY ACTIVITIES/TASKS

A prioritized list of the individual activities you can accomplish in 1 day required to complete your action plans.

1 DREAM / VISION LIST

VISION IS THE IMPULSE PULLING US TO DISCOVER
WHO AND WHAT WE ARE
IT'S THE DIVINE ADVENTURE INTO SELF DISCOVERY
WHERE OUR GREATEST ATTRIBUTES ARE ACTIVATED

We have all had dreams and inspirations throughout our lives. Often we get caught up in the mundane tasks of our everyday life and place our attention on the details instead of taking time to envision the life we desire living. When we have dreams, we activate an aliveness in us, which evokes our creativity. When we are creative and enthusiastic about life we make choices congruent with our values. It is within that context that we attract what we desire experiencing or having.

In general, your dreams fit into the following categories:

- ➔ What you would like to have or own
- ➔ What you would like to do or experience
- ➔ Where you would like to go or travel
- ➔ Who you would like to be or become
- ➔ What you would like to contribute

Your Dream/Vision List is not necessarily your intentions or goals, but rather a method of clarifying what you desire, what excites you, what you think about, and what you want more of in your life. It is not practical!

When you are ready to begin Step 1 of your plan, find an hour of quiet time and begin your Dream/Visions List. Revisit your Life Wheel located in your Lifeline Study Guide. As you visit each section, ask yourself what "ideal" would look like. Consider hiring a Lifeline Coach for an hour session for 12 weeks. Your Coach is trained to support you with this process.

2 INTENTIONS LIST

INTENTIONS ARE COMMITMENTS IN ACTION
THEY ARE YOUR VISION MADE REAL

When you intend on doing, being, or having something, you're in action with your commitments. Don't confuse your intentions with expectations. Expectations have to do with how you believe others should behave or how you want the world to accommodate your desires. The word "goal" has a negative connotation for many of us. Perhaps that is because sometimes when we set a goal we also adopt expectations, which bring us anxiety and fear.

Realize that you cannot control the fruition of a dream or intention. What you can control is the choices you make that support the manifestation of your intentions. Ultimately, all you can control are the thoughts you allow in your mind, your attitude, and the action steps you take.

Intentions are commitments, dreams are not. Your Intentions List will focus on practicalities. The fruition of a dream is an end. Intentions are a means to an end. Your dreams and visions may take a lifetime. Most intentions take no more than a year to realize.

Keep your intentions both specific and measurable. **Specific** means you define your intention in terms that create a clear, concise, mental picture of what you desire to do, be, or have. **Measurable** means you quantify each intention, making it objective instead of subjective. The more specific and measurable your intention, the more quickly you will be able to identify, locate, create, and implement the use of the necessary resources for its attainability.



Let's say your vision is to qualify as one of the top 10 recruiters in your company. The following is an example of what your process, moving through the five elements of the framework, might look like from beginning to end.

1. DREAM/VISION

My vision is to qualify as one of the top 10 recruiters company-wide.

2. INTENTION

My intention is to introduce and qualify 40 new representatives within one year.

My focus is to:

- ➔ Qualify 3-4 representatives per month.
- ➔ Hold a minimum of 14 parties so that I can meet many new guests and hostesses.

3. VALUES

The values that honor this intention are:

- ➔ recognition
- ➔ accomplishments
- ➔ service/contributing
- ➔ personal growth
- ➔ acknowledgement

4. ACTION PLAN/PRINCIPLE-CENTERED CHOICES

Actions and choices that serve my vision and fuel my intention are:

Attributes: I am an engaging and connecting person. I am curious with others, spacious in conversations, and listen intently to others. Each day I read my "Who I Am" card reminding me of these attributes, and I conclude my day asking myself how well I did at "being" these attributes on a scale of 1-10. My intent is to review what worked and what didn't. I will not judge myself for my shortcomings; instead, I will discover the learning in my experiences. In this way I will understand the meaning of these attributes and begin to "live" them more fully.

Education: I will become educated on all aspects of sharing my business opportunity. I will interview 3 top consultants within the next 30 days. I will complete the *Mastering the Art of Sharing your Business Opportunity* program and assignments, and I will work with a coach to strengthen my skills.

Action Plan:

- 1) I will coach my hosts in person.
- 2) I will refine my Opportunity Commercial.
- 3) I will always use a Guest Care Card.
- 4) I will always bring 3 Opportunity Gifts to each party.
- 5) I will always host an Introduction Party for my new representatives and give them all the bookings from that party to get started.
- 6) I will host an Opportunity Celebration on the 2nd Monday of each month and invite guests, hosts, and all local representatives to participate.
- 7) I will open up my schedule to host parties on Tuesday, Wednesday, Friday, and every other Saturday. I will also hold 1½-hour slots in my schedule prior to my parties for coaching hosts and conducting interviews.
- 8) I will make Guest Care Calls and Follow-Up Calls on Sunday evenings and Friday mornings.
- 9) I will host Orientation Celebrations on the 1st and 3rd Mondays of each month for new representatives. I will design the curriculum with my leader within the next 30 days.

5. DAILY ACTIVITIES/TASKS

- ➔ Make up 10 Opportunity Gifts.
- ➔ Pick up tissue paper, gift bags, and beverages for Opportunity Gifts.
- ➔ Call Linda Thompson, Jill Morgan, and Karen McFadden to invite them to the Opportunity Celebration. Mail their invitations.
- ➔ Spend ½ hour scheduling and designing opportunity events for June and July.

You can use this formula with any dream/vision that's important to you, whether it's to get in shape, earn a specific amount of income, enhance a relationship, or learn a new skill. Schedule time weekly to take a vision and break it down by distinguishing an intention (or perhaps several intentions). Then decide which 5 intentions are most important to you.

Lifeline Coaches often invite clients to have only 5 primary intentions. After they distinguish their present deepest intentions, they (coach and client together) set a date to reach each intention, distinguish the values associated with that intention, and decide on the action plan (principle-centered choices) and the daily activities that will MAKE IT HAPPEN.

Remember, each dream/vision is accompanied by intentions congruent with the vision and a target date for attaining them.

Exercise

Before you distinguish your business intentions, determine your ideal month. Take time to contemplate each of the questions and truly imagine the possibilities.

Determine Your IDEAL MONTH

Imagine an ideal month in your business. Focus on your personal business, or if you are a leader, on your team's level of activity. Fill in those statements that apply.

- I would hold _____ number of parties per week.
 - The days I would hold my parties are: _____.
 - The number of guests at my parties would be: _____.
 - I would allow _____ cancellations per week.
 - My party sales would be: _____.
 - I would book _____ parties per show.
 - I would make _____ calls per day.
 - I would have _____ sponsoring interview per week.
 - The number of opportunity events I would hold per month would be: _____.
 - The number of guests at my opportunity events would be: _____.
 - The number of new recruits I would sponsor per month would be: _____.
 - My personal monthly sales volume would be: _____.
 - My group sales volume would be: _____.
 - Number of active consultants in my personal group would be: _____.
 - My monthly royalty check would be: _____.
 - The number of consultants at my monthly meetings would be: _____.
 - I would promote _____ representatives to _____.
 - I would mentor _____ representatives a month who were willing to take their business to the next level.
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- Being realistic about where you are in your business right now, and what you are willing to commit to, what would you like to create in your business next month?

Month of _____

- Number of parties: _____
- Days parties are held: _____
- Number of sponsoring interviews: _____
- Number of business opportunity events: _____

3 VALUES

CONFLICT OCCURS WHEN YOUR INTENTIONS ARE OUT OF ALIGNMENT WITH YOUR VALUES.

This is why it is so important to think about your values and write them down. Only then can you compare your intentions with your values and make choices that honor what's truly important to you.

Have you ever set your sights on something that you thought was important to you, and then achieved it and felt numb or experienced disappointment? This is because your intention wasn't congruent to your values, or perhaps you honored *one* of your values and ignored several others.

Most of the population has no idea what their values are. Many simply accept the value of others, setting goals to meet someone else's values, and in the end they feel empty and find themselves wanting to do something else. Your values will remind you of who you are and what is worth living for in your life. A willingness and courage to embrace, integrate, and apply your values to business and life decisions is like pure rocket fuel, propelling you into authentic aliveness!

Imagine you have a magic compass to guide you through the rough spots and to help you make difficult decisions and set goals for your life or work. Imagine the compass always pointed you in the right direction. If you have ever felt totally confused in your business or life, following the 5 steps to Developing your Life/Business Plan will help you discover your built-in compass that will guide you in the right direction. Navigators have always used North on a compass to guide them. Living by your values will be your "True North" to keep you on a steady, fulfilling, and authentic course. You will be guided by your values compass.

By aligning your intentions with your values and referring to them when faced with decisions, the sense of struggle, overwhelm, discouragement, and frustration in your life will be virtually eliminated. This does take time and it does require you to live with conscious awareness.

Values Clarification Exercise

Listed below are some words that express values. There are two columns to indicate both the importance to you of the value, and your behavior around that value. You will notice that many are similar in nature. If you wish to group them together, do so in any way you wish. If there are words that express your values better than the ones listed here, feel free to add them.

Rate for yourself, using any words or numbers you like, how important the value is to you. Complete the **Importance** column first and then rank your top ten values in priority order of importance. Next, do the same with the **Behavior** column.

Do your top ten behaviors match your top ten values? How well do you live each value?

VALUE	IMPORTANCE	BEHAVIOR
Accomplishment/Results	_____	_____
Achievement	_____	_____
Accuracy	_____	_____
Adventure/Excitement	_____	_____
Aesthetics/Beauty	_____	_____
Affection	_____	_____
Altruism	_____	_____
Autonomy	_____	_____
Authenticity	_____	_____
Beauty	_____	_____
Challenge	_____	_____
Clarity	_____	_____
Comfort	_____	_____
Commitment	_____	_____
Community	_____	_____
Completion	_____	_____
Connecting/Bonding	_____	_____
Creativity	_____	_____
Directness	_____	_____
Emotional Health	_____	_____
Environment	_____	_____
Freedom	_____	_____
Freedom	_____	_____
Friendship	_____	_____
Forwarding the Action	_____	_____
Fun	_____	_____

Harmony		
Honesty		
Humor		
Integrity		
Intelligence		
Intimacy		
Joy		
Kindness		
Leadership		
Learning		
Love		
Loyalty		
Openness		
Outgoingness/Extraversion		
Perfection		
Perseverance		
Personal Growth		
Personal Power		
Mastery/Excellence		
Meaning		
Orderliness/Organization		
Nature		
Partnership		
Peace		
Power		
Privacy/Solitude		
Productivity		
Quietness/Introversion		
Recognition/Acknowledgement		
Resilience		
Risk Taking		
Romance/Magic		
Security		
Self-Expression		
Sensuality		
Serenity		
Service/Contribution		
Simplicity		
Spirituality		
To Be Known/Seen		
Tradition		
Trust		
Vitality/Health		
Wealth		

4 ACTION PLAN / PRINCIPLE-CENTERED CHOICES

PRINCIPLE-CENTERED CHOICES ARE CHOICES THAT ARE WITHIN YOUR REALM OF CONTROL

An Action Plan is a list of successive steps or actions you must take to achieve each intention, and it includes target dates for their completion. An Action Plan enables you to conceptualize and pursue an intention as if it were a single project—which is exactly what it is. All the necessary steps and strategies for completion are in one place on one page, which makes monitoring your progress an easy task.

Often we base our feelings about our competency on something we can't control! Instead, measure your success based on something you have consciously chosen, something that *is* within your realm of control—your thoughts, what you allow into your mind, your attitude or disposition, your state of mind, and where you apply action. We call these choices “Walk Your Talk” choices. They are broken down into two areas: your way of being and what you choose to do. Frequently, we gauge success based on what we do, what we accomplish, instead of who we are. Our true success, however, actually derives from who we are.

In this section, we will determine an Action Plan for who you are *becoming* and what it is that you will focus on *doing*. Notice that in the Action Plan described on page 5 a list of attributes and way of being are clearly stated.

Begin by distinguishing the attributes that will support your intentions. Here is a list of possible attributes to consider. Feel free to add to the list. Notice they are stated in the form of an affirmation.

I am confident	I am authentic
I am an avid listener	I am accepting
I am joyful and expressive	I am disciplined and focused
I am enthusiastic and energetic	I am empowering
I am engaging	I am energetic and vibrant
I am fun and playful	I am gentle
I am interesting and informative	I am present in the moment
I am connecting	I am approachable

Becoming Exercise

1. Choose 3 of those characteristics or attributes you will focus on for 21 days.
2. Explore the possibilities of those 3 characteristics. Explore in writing the answers to the questions below. Also, write down other questions that come up for you, and your answers.
 - ➔ What does this attribute mean to me?
 - ➔ Who am I when I'm characteristic?
 - ➔ How might others perceive me if I were more characteristic?
 - ➔ What might I experience if I were more characteristic?
3. Discover these 3 attributes in others and write about your experience.
 - ➔ What do you notice about them in relationship to that attribute?
 - ➔ How do they act?
 - ➔ How do they express themselves?
4. Read what you wrote for 21 days. At the end of each day ask yourself, on a scale of 1-10, how well you did at living out that characteristic. Distinguish what worked and what didn't. Forget self-judgment. Look for the learning.

Doing Action Plan

<u>Sample Practices</u>	<u>Date I Will Begin</u>	<u>Action to Make it Happen</u>
2-hour Appointment with Self	_____	_____
Appointment with Partner	_____	_____
Write a Strong Introduction	_____	_____
In-person Hostess Coaching	_____	_____
Create an Extraordinary Invitation	_____	_____
Deliver Invitations for Hostess	_____	_____
Make Reminder Calls for Host	_____	_____

- Assemble My "Sponsoring" Bag _____
- Assemble My "Why" Bag _____
- Use a Wish List _____
- Create My "I Believe" Statement _____
- Thank You Note to Host _____
- Thank You Note for Outside Orders _____
- Create System for Lead Follow-Up _____
- Create System to Track Expenses _____
- Weekly Mentoring with Team _____
- Develop Business Opportunity Event _____
- Design a business plan _____
- Hire a coach _____
- Create a plan for implementing
an Orientation Celebration _____
- Implement one-on-one Mentoring
Program _____
- Design and Implement New Office
Hours _____
- Mastermind with spouse weekly _____



5 DAILY ACTIVITY LIST

IF YOU ARE NOT CLEAR ABOUT YOUR DAY
CIRCUMSTANCES WILL DETERMINE YOUR OUTCOME

Your Daily Activity List is a prioritized list of activities that need to be done to meet the objectives of your Action Plan. Your daily activities will vary depending on what specifically needs to be completed or implemented.

To prepare your Daily Activity List, break down all the tasks required to reach your intentions. Use the “how and when” method, and arrange the tasks in priority order. Now, write them onto a *monthly* agenda and prioritize the tasks for each particular month.

The “daily” concept comes in when you review the monthly list every day, and by priority, transfer tasks to your “To Do” list for the day. Here’s the key—only transfer tasks to your “To Do” list if they truly can be completed in one day. If a task can’t be completed in a day, break it down further.

Completing all these small, manageable daily tasks makes reaching your intention easy—almost like connecting the dots of a puzzle. What seemed a very lofty goal can be achieved quite easily by using this bite-sized organizational plan!

Transfer tasks not done to the next month’s Daily Activity List only at the end of a month. Studies have shown that you can lose up to a week of time transferring undone tasks to new daily “to do” lists. Most people spend at least ten minutes a day transferring old items to a new list. Franklin Covey has quality products that support effective time management systems.

Lifeline Coaching and Education, Inc. offers many resources, programs, and services to support the Direct Sales professional. The greatest service we can offer you, by far, is coaching. Many leaders in the Direct Sales community have transformed their lives and businesses by working with a certified Lifeline Coach who specializes in the Direct Sales Industry. For more information visit us at www.LifelineCoaches.com.