

My Life Plan

OBITUARY

MY STORY SUMMARY

My Life Plan Ten-Year Vision

IF A MOVIE WAS MADE ABOUT YOUR LIFE THIS YEAR, WHAT WOULD IT BE CALLED?

AGE

CAREER

- ---
- ---
- ---
- ---
- ---

HEALTH

- ---
- ---
- ---
- ---
- ---

FAMILY

- ---
- ---
- ---
- ---
- ---

FRIENDS

- ---
- ---
- ---
- ---
- ---

SPIRITUAL

- ---
- ---
- ---

- ---
- ---
- ---

2 THINGS I TRY TO DO EVERY DAY

- _____
- _____

2 THINGS I DON'T DO

- _____
- _____

MY STORY SUMMARY AT THIS POINT IS

My Life Plan **Five-Year Vision**

IF A MOVIE WAS MADE ABOUT YOUR LIFE
THIS YEAR, WHAT WOULD IT BE CALLED?

AGE

CAREER

- ---
- ---
- ---
- ---
- ---

HEALTH

- ---
- ---
- ---
- ---
- ---

FAMILY

- ---
- ---
- ---
- ---
- ---

FRIENDS

- ---
- ---
- ---
- ---
- ---

SPIRITUAL

- ---
- ---
- ---

- ---
- ---
- ---

2 THINGS I TRY TO DO EVERY DAY

- _____
- _____

2 THINGS I DON'T DO

- _____
- _____

MY STORY SUMMARY AT THIS POINT IS

My Life Plan **One-Year Vision**

IF A MOVIE WAS MADE ABOUT YOUR LIFE
THIS YEAR, WHAT WOULD IT BE CALLED?

AGE

CAREER

- ---
- ---
- ---
- ---
- ---

HEALTH

- ---
- ---
- ---
- ---
- ---

FAMILY

- ---
- ---
- ---
- ---
- ---

FRIENDS

- ---
- ---
- ---
- ---
- ---

SPIRITUAL

- ---
- ---
- ---

- ---
- ---
- ---

2 THINGS I TRY TO DO EVERY DAY

- _____
- _____

2 THINGS I DON'T DO

- _____
- _____

MY STORY SUMMARY AT THIS POINT IS

PRIMARY TASK

DEADLINE

- | | |
|-----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |
| 4. _____ | _____ |
| 5. _____ | _____ |
| 6. _____ | _____ |
| 7. _____ | _____ |
| 8. _____ | _____ |
| 9. _____ | _____ |
| 10. _____ | _____ |

Manage Your Projects and Goals

Setting and Achieving Goals

- Reflect on your goals every day.
- Understand why the goal matters to you.
- Set a deadline to accomplish the goal.
- Have partners in the goal.
- Keep score on the goal and be determined to drive up the score.

Key Takeaways

Goal Setting Worksheet

GOAL NAME

WHY THIS GOAL MATTERS TO ME

COMPLETION DATE

GOAL PARTNER(S)

MILESTONE 1

MILESTONE 2

MILESTONE 3

MY DAILY SACRIFICE(S) TO REACH THIS GOAL

PARTS OF THIS PROJECT THAT MUST BE COMPLETED

☐

☐

☐

☐

☐

☐

REPETITION RECORD

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

Goal Setting Worksheet

GOAL NAME

WHY THIS GOAL MATTERS TO ME

COMPLETION DATE

GOAL PARTNER(S)

MILESTONE 1

MILESTONE 2

MILESTONE 3

MY DAILY SACRIFICE(S) TO REACH THIS GOAL

PARTS OF THIS PROJECT THAT MUST BE COMPLETED

☐

☐

☐

☐

☐

☐

REPETITION RECORD

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

Goal Setting Worksheet

GOAL NAME

WHY THIS GOAL MATTERS TO ME

COMPLETION DATE

GOAL PARTNER(S)

MILESTONE 1

MILESTONE 2

MILESTONE 3

MY DAILY SACRIFICE(S) TO REACH THIS GOAL

PARTS OF THIS PROJECT THAT MUST BE COMPLETED

☐

☐

☐

☐

☐

☐

REPETITION RECORD

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

How to Manage Your Daily Tasks With the BMS Daily Planner

Key Takeaways

A daily planner should do eight things:

1. Keep you on track to accomplish your life vision.
2. Remind you of your life theme.
3. Separate your important projects from your tasks.
4. Help you experience a sense of meaning every day.
5. Inspire you to work rather than procrastinate.
6. Keep you aware of your appointments.
7. List your tasks.
8. Remind you of your goals.

The Business Made Simple Daily Planner

ELEMENT ONE

Review your life plan. Read your obituary and review your ten-year, five-year, and one-year vision.

ELEMENT TWO

Affirm your life story summary.

ELEMENT THREE

Determine the important projects you will work on.

ELEMENT FOUR

Ensure the day is guided by wisdom and meaning.

ELEMENT FIVE

Overcome the desire to procrastinate.

ELEMENT SIX

Keep track of the day's appointments.

ELEMENT SEVEN

Manage your tasks.

ELEMENT EIGHT

Remind yourself of your goals.

Daily Planner Key

The Business Made Simple Daily Planner will help you manage your time and energy so you get the most done without procrastinating or losing focus. Use this key to understand each section the planner. Our hope is this planner will help you have a positive impact on the world.

Reviewed Life Plan: Check this box if you read through your life plan on this day.

Primary Task One: This is the most important project you need to make progress on today.

H___M___: Use this section to write down how many hours and minutes you worked on project one.

Rest/Reward: Identify what reward you will give yourself for working on project one.

Primary Task Two: Identify the second most important project you need to work on today.

Primary Task Three: Identify the third most important project you need to work on today.

To-Do: Write down the tasks you need to accomplish. By separating your tasks from your important projects, you remind yourself that your tasks are not as important as the major projects you need to make progress on. Feel free to transfer unaccomplished tasks to the next day, but don't skip the important work you need to do on your projects.

My Story Summary: How would you summarize your storyline if it were to be made into a movie?

Reviewed Goals: Check this box if you reviewed your goals on this day.

If this were the second time I were living this day, what would I do differently?:

Answer the question Dr. Viktor Frankl instructed his patients to ask that taught them to see the day before them more clearly. He asked his patients to pretend they were living this day for the second time and to not make the same mistakes. By asking ourselves this question each day, we live intentionally and with more wisdom.

Things I get to enjoy today: Identify activities and experiences you will get to enjoy later in the day. This will help you overcome procrastination on your important projects. Procrastination often happens when we believe we have to work rather than have fun. When we identify that the day will be a mixture of work and fun, we are less likely to procrastinate. In addition, identifying the experiences we will enjoy later in the day gives us a more positive attitude about the day.

Appointments: Write down all the appointments you will need to keep that day. This will prepare your mind for what is to come.



I'VE REVIEWED MY LIFE PLAN



I'VE REVIEWED MY GOALS

TODAY'S DATE:

PRIMARY TASK ONE

H: M:

Rest/Reward:

PRIMARY TASK TWO

H: M:

Rest/Reward:

PRIMARY TASK THREE

H: M:

Rest/Reward:



95%



75%



50%

**IF THIS WERE THE SECOND TIME I WERE LIVING
THIS DAY, WHAT WOULD I DO DIFFERENTLY?**

- ---
- ---
- ---
- ---
- ---
- ---

THINGS I GET TO ENJOY TODAY

- ---
- ---
- ---
- ---
- ---
- ---

APPOINTMENTS

- ---
- ---
- ---
- ---
- ---
- ---
- ---
- ---

SECONDARY TASKS

- | | |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> <hr/> | <input type="checkbox"/> <hr/> |
| <input type="checkbox"/> <hr/> | <input type="checkbox"/> <hr/> |
| <input type="checkbox"/> <hr/> | <input type="checkbox"/> <hr/> |
| <input type="checkbox"/> <hr/> | <input type="checkbox"/> <hr/> |
| <input type="checkbox"/> <hr/> | <input type="checkbox"/> <hr/> |
| <input type="checkbox"/> <hr/> | <input type="checkbox"/> <hr/> |

MY STORY SUMMARY:
