

PERSONAL DIRECTION EXERCISES

Roles in Life – Define the roles/pieces of your life. Use this to develop many parts of this process, including most specifically the vision statement and specific goals in each area.

Examples of roles that might make sense:

- ◆ Roles of parent, sibling, partner, community member, friend, employer, business owner. Plus additional goals of health and creativity.
- ◆ Career, money, health, friends/family, romance, personal growth, fun, physical environment.

Vision Exercise – Create a vision of the future based on the various roles you play.

1. Start with the roles that you've defined. Think about the future you would ideally like to have many years out – ten years or more.
2. Define specific conditions in each of these areas. Don't be constrained by resources or rules of the present. Describe what you would really like the world to look like – what you are working to create in the world.
3. It may be helpful to have an exercise to open the creativity. Try one of these:
 - ◆ Write a letter to a great friend or loved one based on a future date. Write about the conditions that exist as you write about the "present" at that time. Be specific, touching on all of the areas you identified in your roles/pieces of life.
 - ◆ Write your obituary many, many years out. Describe the many, many ways that you improved the various parts of your life (roles) over time.
 - ◆ In both of these exercises, be fun and frivolous, but also describe accurately what you really want. Don't get caught up with the exterior of what you want – get into the inside of it. For example, don't focus on being "fabulously wealthy," but on the things that wealth might provide for you – flexibility, charity, changing lives, etc.

Mission Statement – Create a statement of what you want to accomplish in your life – your purpose and driving force.

1. Identify the needs in your various communities (world, town, family) that are most important to you. What do you think is most needed to make these communities better and healthier?
2. Identify your niche in each of these communities. This is slightly different than your roles – more generally where you fit into these areas of life.

PERSONAL DIRECTION EXERCISES (CONTINUED)

3. Define a purpose that meets the needs you have in these areas. Start with individual words that describe what you want, expand to phrases and then create a single statement. Make it as long as you need, but keep it as short as you can. Try to boil longer phrases and sentences down to their essence. Describe as concisely as possible what you want your life to be all about.
4. Let it sit. Come back to it within a week and take on the parts that don't sing. Understand what it is trying to say and write three other ways of saying it. Work it and work it until you have something that feels right.
5. Let it sit again. Repeat the refinement of the pieces that feel the least smooth and find other words that get to the same essence.

Values Clarification – Define the values that guide all aspects of your life. Articulate the core values that you believe define who you are and who you are trying to become. This should be a set of statements that focus on what you are and are working actively to become, not a wish list of what you would ideally like to be.

1. Start with a blank piece of paper and start defining the human characteristics that you possess of which you are most proud. Define the complements given to you by the people you most respect. Identify the characteristics of the people you most respect that you are actively trying to emulate and become.
2. Use an exercise or visualization to help you find your most important values. Here are several examples:
 - ◆ Find a peak moment in your life when the whole world was perfect. Make it as specific a moment as you can. What values were present at that moment? What was most powerful at that particular moment?
 - ◆ Remember a very low moment when things were very glum. Define what it was about that moment that was so dejecting and negative. Find the exact opposite of that feeling and describe it as a value.
 - ◆ Define the things that you must have to be happy in your life. Beyond food and shelter, what do you most need to be happy? Use that to define the specific values that are most important to you.
3. Write the words down on a list. Start with single words, and then create word strings. Put the similar concepts together with the most significant term at the beginning, and then the other words that further define and compliment the first, e.g. *leadership/empower/collaborate* and *integrity/honesty/walk-the-talk*.

PERSONAL DIRECTION EXERCISES (CONTINUED)

4. Prioritize the values of greatest importance to you. Draw a line between your first level values and second level values. Try to understand why some of them are more important to you than others. Use that thinking to focus your values definitions.
5. Expand the word strings into more complete sentences. Use the first word as the value and define it with the other words in your string.

Goal Steps – Define the results you are working to achieve in your life. Show what results you want to achieve in each of the areas that are important to you. Understand where you have strength and where you have balance – or not.

1. Start with the roles you've defined. Evaluate where you are in your life in each of these facets. Where are you on a scale of one – ten on your scale of where you want to be?
2. Draw a circle and divide your "pie" into the various goals that are important to you. Graphically depict the level of satisfaction you have with each goal area. Examine the question of balance in our life: Are you fulfilling the most important areas well? Are you balancing the many interests in your life effectively?
3. Develop specific goals for what you would like to achieve in each area. Write the goal in outcome language – what would it look like once you were there? Try to make them concise and specific, and work toward one goal per area.

Action Steps – Define the things you can do to support the goals of your life.

1. **Create a list of broad actions.** Within each goal, as what the most important thing you could do that would make the biggest different to you in this goal. What could I do consistently well that would do the most to help me reach this goal? These should be defined more as broad actions you could take rather than specific actions that would be accomplished in a day. Think of these more as strategies rather than actions.
2. **Prioritize and combine these broad actions.** Pare this down to the best actions that you think move you toward each of your goals.
3. **Create a list of activities for each action.** What is something that you could begin and complete in the next three months that would support the broad actions defined above? Some of these might take only minutes to complete but would be repeated every single day of your life (do 10 minutes of stretching every morning). Others are actions you would do once and never do again (apologize to a good friend about a mistake you had made that is eating away at you).

PERSONAL DIRECTION EXERCISES (CONTINUED)

4. **Prioritize and combine the specific activities.** Narrow it down to the short list of your most important actions. Pick the ones that you want to have in your plan for now. Move the others to a list of possible contingent activities should you want to update or expand your plan.
5. **Put activities on your weekly task list to support these activities.** Start your weekly planning with this list of most important activities, before the daily noise and distractions from work fill you plate. Place activities into specific days, rather than putting them into a general list. Maintain a list of activities at least two weeks out broken down by individual days.
6. **Maintain integrity in the moment of decision.** When it comes time to do the things that you have defined as most important, give it the priority it deserves by doing it. Don't let difficult and challenging tasks put you off.
7. **Review your list every quarter.** Check in to see if what you decided you wanted to do you are actually getting done. If something on your list keeps getting postponed, decide why. Review your personal direction to remind you why you wanted to do that. If you think something should be removed from our list, modify the plan to provide the integrity to your thinking – don't just ignore it or remove it because you don't want to do it now.