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# Life & Career Planning LLC

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**This workbook is a companion to the book *Time To Get Real!***

Life and Career Planning developed this copywrited workbook to be utilized in coaching, seminars, courses and other events.  
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## SELF

### Interests

**My Interests** (exercise on page 19 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Interrogating My Interests** (exercise on page 21 of *Time To Get Real!*)

Interest 1 \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Interest 2 \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_



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Why? \_\_\_\_\_

Interest 3 \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Interest 4 \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

Why? \_\_\_\_\_

**Themes I see Emerging** (exercise on page 23 of *Time To Get Real!*)

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## How Much Time Do I Spend? (exercise on page 24 of *Time To Get Real!*)

My Interests	Time Spent
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

## Activities I Spend Time On That Are Not Key Interests (exercise on page 25 of *Time To Get Real!*)

1. _____	Why? _____
2. _____	Why? _____
3. _____	Why? _____
4. _____	Why? _____
5. _____	Why? _____



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**Interests That I plan to Prioritize as More Important**  
(exercise on page 28 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Interests of Habits That I Plan to Reduce or Eliminate**  
(exercise on page 28 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What Have I Learned by Exploring My Interests?**  
(exercise on page 29 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 30 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Joy

**In my life, one of my joyous experiences occurred when:**  
(exercise on page 36 of *Time To Get Real!*)

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**I felt joy when having the following achievement:**  
(exercise on page 36 of *Time To Get Real!*)

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**Other experiences or occurrences of joy:**  
(exercise on page 37 of *Time To Get Real!*)

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**Themes**  
(exercise on page 38 of *Time To Get Real!*)

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**What Have I Learned by Exploring What Brings Me Joy?**  
(exercise on page 39 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 40 of *Time To Get Real!*)

1. 

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2. 

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3. 

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4. 

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## Personal Values

### **My Values**

(exercise on page 48 of *Time To Get Real!*)

<b>My personal value</b>	<b>Why is this important to me?</b>	<b>Where does it come from?</b>
1-		
2-		
3-		
4-		
5-		
6-		
7-		
8-		





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## The Integration of My Interests, Joy, and Values (exercise on page 51 of *Time To Get Real!*)

<b>Interests supported at home or work</b>	<b>Potential for joy at work of home</b>	<b>Values supported at work or home or lack thereof</b>
1-Creating a new program at work with others	Leading a successful team	Learning or creating
2-Bike riding with children	Family time together	Love of family



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**What Have I Learned by Exploring My Personal Values**  
(exercise on page 52 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 53 of *Time To Get Real!*)

1. 

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2. 

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3. 

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4. 

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## Relationships

**My Key Relationship(s)**  
(exercise on page 57 of *Time To Get Real!*)

Relationship(s)	Why is This a Key Relationship?
_____	_____
_____	_____
_____	_____
_____	_____

**What Have I learned by Exploring My Relationships?**  
(exercise on page 63 of *Time To Get Real!*)

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**Ideas for My Action Plan Regarding My Key Relationships**  
(exercise on page 64 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Ideas for My Action Plan Regarding My Positive Relationships**  
(exercise on page 64 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Ideas for My Action Plan Regarding My Negative or Toxic Relationships**  
(exercise on page 65 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_



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## Life Purpose/Mission

### **My Purpose or Mission**

#### **This is who I am:**

(Describe the many facets of you and your life--what kind of person are you?)  
(exercise on page 69 of *Time To Get Real!*)

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#### **This is why I am here:**

(What is your purpose in life? It helps define who you are and how you will live.)  
(exercise on page 70 of *Time To Get Real!*)

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**This is how my life takes on meaning:**

(What is most important to me? This can be experiences, feelings, people, or values.)  
(exercise on page 70 of *Time To Get Real!*)

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**This is to what I am committed:**

(What do you consider a non-negotiable in your life? What do you always show up for? What do you refuse to abandon?)  
(exercise on page 70 of *Time To Get Real!*)

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**This is how I want to live my life:**

(Put all these things together to form a picture of how you want your life to look at its best.)  
(exercise on page 71 of *Time To Get Real!*)

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**My Purpose Statement**  
(exercise on page 74 of *Time To Get Real!*)

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**What Have I learned by Exploring My Life Purpose?**  
(exercise on page 76 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 77 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_





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## Life Balance

**How I Spend My Time**  
(exercise on page 81 of *Time To Get Real!*)

<b>Activity</b>	<b>Average % of time spent daily</b>	<b>Average % of time spent weekly</b>
Work		
Family activities		
Recreational pursuits		
Sleep		
Time with friends/ significant others		
Learning		
Exercising		



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**Someone You Know Who Appears to Be a Happy and Healthy Person**  
(exercise on page 83 of *Time To Get Real!*)

**Name:**

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**Attributes and Attitudes:**

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**When My Life Is in Balance and in a Positive State, It Looks Like This**  
(exercise on page 88 of *Time To Get Real!*)

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## How I Would Like to Spend My Time (exercise on page 88 of *Time To Get Real!*)

<b>Activity</b>	<b>Average % of time spent daily</b>	<b>Average % of time spent weekly</b>
Work		
Family activities		
Recreational pursuits		
Sleep		
Time with friends/ significant others		
Learning		
Exercising		
<i>Add here anything that you added in the chart above:</i>		





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**Actions to Consider**  
(exercise on page 92 of *Time To Get Real!*)

<b>Activity</b>	<b>Average % of time spent daily</b>	<b>Average % of time spent weekly</b>
Work		
Family activities		
Recreational pursuits		
Sleep		
Time with friends/ significant others		
Learning		
Exercising		
<i>Add here anything that you added in the chart above:</i>		



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## WORK/CAREER

### Personal Strengths and Development Areas

#### **My Strengths and Areas for Development**

(exercise on page 102 of *Time To Get Real!*)

<b><u>Personal</u> Areas of Strength</b>	<b><u>Personal</u> Areas of Development</b>
<b><u>Professional</u> Areas of Strength</b>	<b><u>Professional</u> Areas of Development</b>





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**Actions for Areas That Need Development**  
(exercise on page 109 of *Time To Get Real!*)

<b>Personal and Professional Development Areas</b>	<b>Action Steps to be Taken</b>	<b>Timeline for Completion</b>





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## Organization Mission, Values, and Culture

**My and My Organization's Mission and Values**  
(exercise on page 119 of *Time To Get Real!*)

<b>My Organization's Mission Statement</b>	<b>My Personal Mission Statement</b>
<b>My Organization's Values</b>	<b>My Personal Values</b>



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**What Have I Learned by Exploring the Mission,  
Values, and Culture of My Organization?**  
(exercise on page 124 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 125 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_



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## Financial Plans

### **My Life Expectancy**

(exercise on page 129 of *Time To Get Real!*)

My family history:	
My health:	
What do the experts say with their life expectancy calculator?	
My conclusion:	

### **Current and Projected Income and Expenses**

(exercise on page 132 of *Time To Get Real!*)

<b>Income</b>	<b>My current income</b>	<b>My expected retirement income</b>
Salary	\$	\$
Rental Income	\$	\$
Investment Income	\$	\$



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Social Security	\$	\$
Other	\$	\$
Other	\$	\$
<b>Total</b>	\$	\$
<b>Expenses</b>	<b>My current expenses</b>	<b>My expected retirement expenses</b>
Housing	\$	\$
Home Maintenance	\$	\$
Food	\$	\$
Clothing		
Insurance	\$	\$
Automobile	\$	\$
Vacations	\$	\$
Entertainment	\$	\$
Education	\$	\$
Savings	\$	\$
Other	\$	\$
Other	\$	\$
<b>Total</b>	\$	\$



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**What Have I Learned by Exploring Financial Plans?**  
(exercise on page 143 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 144 of *Time To Get Real!*)

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2. 

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3. 

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4. 

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## Current and Future Position

**What Have You Learned about Comparing Aspects of Yourself with Your Current Organization and Role? Is There Any Potential Action That You Need to Consider?**  
(exercise on page 152 of *Time To Get Real!*)

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**My Next Job: Aligning with My Mission, Values, and Career Trajectory**  
(exercise on page 155 of *Time To Get Real!*)

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**Document Here, for Consideration Later, Potential Actions That Come to Mind or Considerations for When You Do Your Action Plan**  
(exercise on page 160 of *Time To Get Real!*)

<b>Current Position</b>	<b>Future Position</b>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____

## Crossing Age Groups and Cultures

**What Have You Learned by Considering Different Age Groups and Cultures?**  
(exercise on page 174 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 174 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Personal Vision

**My Personal Vision Statement**  
(exercise on page 186 of *Time To Get Real!*)

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**What Have You Learned by Developing Your Personal Vision?**  
(exercise on page 188 of *Time To Get Real!*)

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**Ideas for My Action Plan**  
(exercise on page 188 of *Time To Get Real!*)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Analysis and Learning

**Document Your Responses to the Following Questions**  
(exercise on page 191 of *Time To Get Real!*)

What are the major lessons you learned about yourself by using this model?

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How do your interests, the things that give you joy, and your personal values intersect with one another?

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What does your work on the model tell you about your current relationships? Are any of them toxic? Which have the most meaning for you?

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Does your current life balance reflect who you want to be and how you want to live your life?

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Are you in a personal and professional position to be able to achieve your life's purpose?

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Are you going to be able to achieve your desired career outcomes where you work now? If not, what are you going to do? What are your options?

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Are there areas of your own personal or career development that you must focus on?

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Do you have a financial plan? If not, when will you have one?

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Describe your current work environment. Are you relatively happy? Do you like your job?

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Does your job impact your personal life, including your relationships with family and friends, the way that you want it? Are you making enough money? Do you have enough free time?

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What are the key themes in your life?

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What is disturbing, uncomfortable, or even scary about your current life situation? Why is it disturbing? Are you willing to do something about your situation so that it is no longer disturbing?

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Currently in your life and career, do you see any opportunities? What makes it an opportunity? Can you be opportunistic and take advantage of it?

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What are you hiding that needs to be brought into the light?

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What next steps do you need to take to help you prepare for success?

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**Lessons Learned, Observations, Potential Actions, and Potential Opportunities**  
(exercise on page 198 of *Time To Get Real!*)

**Interests:**

Lessons: \_\_\_\_\_

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Observations: \_\_\_\_\_

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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_

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**Joy:**

Lessons: \_\_\_\_\_

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Observations: \_\_\_\_\_

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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_





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**Personal Values:**

Lessons: \_\_\_\_\_

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Observations: \_\_\_\_\_

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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_

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**Relationships:**

Lessons: \_\_\_\_\_



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Observations: \_\_\_\_\_

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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_

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**Life Mission/Purpose:**

Lessons: \_\_\_\_\_

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Observations: \_\_\_\_\_



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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_

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## **Life Balance:**

Lessons: \_\_\_\_\_

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Observations: \_\_\_\_\_

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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **Strengths and Development Areas:**

Lessons: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Observations: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Potential Actions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Potential Opportunities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **Organizational Culture, Mission and Values:**

Lessons: \_\_\_\_\_



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Observations:

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Potential Actions:

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Potential Opportunities:

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## **Financial Plans:**

Lessons:

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Observations:

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Potential Actions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Potential Opportunities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Current and Future Positions:**

Lessons: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Observations: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Potential Actions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Potential Opportunities: \_\_\_\_\_



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**Crossing Age Groups and Cultures:**

Lessons: \_\_\_\_\_

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Observations: \_\_\_\_\_

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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_

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**Vision:**

Lessons: \_\_\_\_\_



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Observations: \_\_\_\_\_

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Potential Actions: \_\_\_\_\_

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Potential Opportunities: \_\_\_\_\_

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## **Emerging Themes**

*(exercise on page 209 of *Time To Get Real!*)*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_





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6. \_\_\_\_\_

7. \_\_\_\_\_

## **Opportunities**

*(exercise on page 212 of Time To Get Real!)*

1. \_\_\_\_\_

Action 1

Action 2

2. \_\_\_\_\_

Action 1

Action 2

3. \_\_\_\_\_

Action 1

Action 2

4. \_\_\_\_\_

Action 1

Action 2

5. \_\_\_\_\_

Action 1

Action 2



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**Things That Disturb Me**  
*(exercise on page 215 of *Time To Get Real!*)*

1. \_\_\_\_\_

Action 1

Action 2

2. \_\_\_\_\_

Action 1

Action 2

3. \_\_\_\_\_

Action 1

Action 2

4. \_\_\_\_\_

Action 1

Action 2

5. \_\_\_\_\_

Action 1

Action 2





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**My Strategies, Goals, and Actions**  
(exercise on page 223 of *Time To Get Real!*)

**Year 1**

Q1	Q2	Q3	Q4
Strategy:	Strategy:	Strategy:	Strategy:
Goal:	Goal:	Goal:	Goal:
Actions:	Actions:	Actions:	Actions:



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## Year 2

Q1	Q2	Q3	Q4
Strategy:	Strategy:	Strategy:	Strategy:
Goal:	Goal:	Goal:	Goal:
Actions:	Actions:	Actions:	Actions:



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## My Life and Career Plan (exercise on page 226 of *Time To Get Real!*)

<b>Model Topic</b>	<b>Insights</b>	<b>Strategy</b>	<b>Goals and Timeline</b>	<b>Monitoring for Results</b>
<i>Document in each of the blank spaces below the model topic that you have chosen to include in your first action plan</i>	<i>Document in each of the blank spaces below what insights or learning you uncovered in this model section.</i>	<i>Document in each of the blank spaces below the strategies that are important to you</i>	<i>Document in each of the blank spaces below what goals and actions you will accomplish and when</i>	<i>As you proceed with your plan and begin to achieve your goals or hit roadblocks, use this column to record your status</i>
<b>Model Topic</b>	<b>Insights</b>	<b>Strategy</b>	<b>Goals and Timeline</b>	<b>Monitoring for Results</b>
<b>Model Topic</b>	<b>Insights</b>	<b>Strategy</b>	<b>Goals and Timeline</b>	<b>Monitoring for Results</b>



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<b>Model Topic</b>	<b>Insights</b>	<b>Strategy</b>	<b>Goals and Timeline</b>	<b>Monitoring for Results</b>
<b>Model Topic</b>	<b>Insights</b>	<b>Strategy</b>	<b>Goals and Timeline</b>	<b>Monitoring for Results</b>
<b>Model Topic</b>	<b>Insights</b>	<b>Strategy</b>	<b>Goals and Timeline</b>	<b>Monitoring for Results</b>



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