

2020 PLANNING VISION

Life Area Retrospective Worksheet

Design your VISION for your FUTURE

BEGIN.

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Life Area Retrospective Guide

How big is a slice of life?

There are various ways to categorize your life. The larger the number of life areas you track the more detailed you'll get and you'll sure to miss less aspects of your life. But you have to balance this with the amount of effort you have available and are willing to dedicate to this process. There's nothing wrong in starting with a small amount of life areas or jumping straight to the one or more glaring areas for opportunity for your life. Sometimes some areas of your life have become so stagnant, so unsustainable that its prudent to jump right into those. The big 4, identity, relationships, health, and finances are usually the top areas of focus. But your life of course consists of so much more.

Hal Elrod uses 10 areas for his Level 10 Life, which you fill out to jump start the Miracle Morning. Zig Ziglar's Wheel of Life has 7 core areas. On the other end of the spectrum, Alex Vermeer, whom I owe a ton for the inspiration of my own journey to review yearly, uses an ever evolving list that has grown to 15 distinct life areas. This guide contains definitions and questions for the 12 life areas that I use. But I've left the actual worksheets blank so you can use your own. This is about YOUR life after all. Just print out the last page of this document however many times you need to fill your Wheel of Life and go as deep and as wide as you want.

"that's what she said" - Michael Scott

Your Present Reality

In order to gain clarity and focus about the future, it is essential to be free from the past. Before you turn your attention to your future, let's first set the record straight about the past. Since you'll be planning the next year, you want to review the last year to capture events, accomplishments, lessons, and make some judgments about your actions.

Reflect with compassion & honesty

This is not a time to turn a blind eye. You owe it to yourself to be honest with yourself. Should you encounter any difficult or painful memories, I suggest journaling with compassion and curiosity. While there's nothing about the past we can change, often once we understand the message we can see events through a lens that allows us to grow from them. None of us are perfect, so instead of being hard on yourself seek to understand the lessons that experiences teach us.

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Life Areas - Core 6

Character & Identity

Your identity and model of yourself. Your strengths and weaknesses, virtues and vices. Your intelligence, integrity, honesty, courage, compassion, honor, self-discipline, and so on.

Love & Family

Your intimate relationships and family connections.

Money & Finances

Your savings, investments, assets, and debt. How your money is organized and managed. Your inflows, budgets, and outflows.

Health & Fitness

Your eating habits, diet, exercise habits, and activity level. Your sleeping patterns and quality. Your major health issues and susceptibilities.

Career & Work

Your work, job, career, and business. Your position, title, role and responsibilities. Your source of income.

Purpose & Contribution

Your philosophy of life. Your sense of purpose, vision, and meaning. How you give value to the world, make a difference, and have a positive impact.

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Life Areas - Dig Deeper

Education & Skill Development

You learning, education, and mental development. Your talents and skills. Your skill development, practicing, and training.

Social Life & Relationships

The intimate relationships you have or want to have. The quality of your relationships. Your home life and relationships with family members. Your friend circles and social experiences. Your club, organization, and community memberships.

Mental & Emotional Development

Your general feeling about life, optimism or pessimism, positivity or negativity. Your emotional intelligence. Your subjective well-being, self-esteem, self-respect, and self-compassion.

Location & Possessions

Your physical presence in the world. Where you are in the world. Your living situation. Your stuff. What you own and why. Your material sufficiency. Your mobility.

System & Habits

Your memorized solutions, daily routine, schedule, effectiveness, organization, and productivity. Your setup, systems, processes, tools, and technique

Adventure & Creativity

Your hobbies, pastimes, and things you do for fun and adventure. Your creativity and its expression.

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Life Area Retrospective Instructions

How to fill out the Life Area Retrospective Worksheet

Start by rating the metrics. What is your satisfaction level. How sustainable is your current effort or experience? What is your mastery level? Are you just getting your feet wet or is this an area you've got pretty much on autopilot (which comes with its own blindspots). How would you rate the opportunity in this area?

Fill out the Habit Scorecard. What habits, initiatives, and process do you regularly take in this area? Next ask yourself if each item is a positive, neutral, or negative influence. Add the frequency to note how often you do this. Is this a daily habit or a quarterly process?

Start digging a bit deeper. Fill out the sections for Accomplishments, Lessons, Important Events, Biggest Problems, Strengths, and Weaknesses.

Use the "Your Present Reality" notes section to write a short paragraph summarizing your thoughts about that area of your life. What went well? What did not go well? Where did you try hard? Where did you not try hard enough? What is the current situation here? How do things stand right now? How would I summarize to a friend the status of this area?

What is the most important problem here? What is my biggest bottleneck? What is most holding me back from achieving my full potential? What single thing, if successfully performed, would have the biggest impact here?

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Life Area Retrospective

_____ Life Area

Satisfaction 1 2 3 4 5 6 7 8 9 10

Sustainability 1 2 3 4 5 6 7 8 9 10

Mastery Level 1 2 3 4 5 6 7 8 9 10

Opportunity 1 2 3 4 5 6 7 8 9 10

_____ 1 2 3 4 5 6 7 8 9 10

_____ 1 2 3 4 5 6 7 8 9 10

Habit Scorecard		
Habit	(+/-)	Freq.
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Accomplishments

Lessons

Your Present Reality

Important Events

Biggest Problems

Strengths

Weaknesses
