

EXAMPLE

DATE: _____

Begin by asking yourself these questions and then fill in the answers below. Then, schedule any key actions into your calendar & Weekly Planner to ensure you bring to completion.

PHYSICAL HEALTH - What have I done, or will I do, to improve or maintain my health?

PAST -	Joined my local gym and invested in a personal trainer
PRESENT -	Reduced calorie days, twice per week
FUTURE -	Start training towards next year's London Marathon

MENTAL HEALTH - What have I done, or will I do, to boost my confidence?

PAST -	Invested in monthly calls with a mindset coach
PRESENT -	Recently introduced daily huddles, to kick off each day with a strong team spirit and clear plan
FUTURE -	Get dates in the diary with friends Looking forward to meeting new clients next month

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PERSONAL MONEY - What have I done, or will I do, to make or save money?

PAST -	Shopped around for the best deal on my tv and phone subscriptions
PRESENT -	Working on a big client case that will go towards my personal income target
FUTURE -	Upcoming meeting with new clients - should go towards this quarter's target

BUSINESS MONEY - What have I done, or will I do, to improve my business?

PAST -	Put together new business plan, including automated processes for the business
PRESENT -	Setting financial goals with co-directors
FUTURE -	Focus on financial data

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RELATIONSHIPS - Who and what do I value? Does anything need to change?

PAST -	x
PRESENT -	x
FUTURE -	x

SENSE OF PURPOSE - Who did I, or will I help to have a better day?

PAST -	Published my new book, hopefully it will help many people
PRESENT -	Raised target amount for charity run this month
FUTURE -	Ensure monthly company newsletter goes out Focus on new business

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HAVING FUN - What have I enjoyed and what am I looking forward to?

PAST -	Bought a new bike and started cycling again Really enjoyed being outdoors
PRESENT -	Playing golf twice per week
FUTURE -	Upcoming family holiday