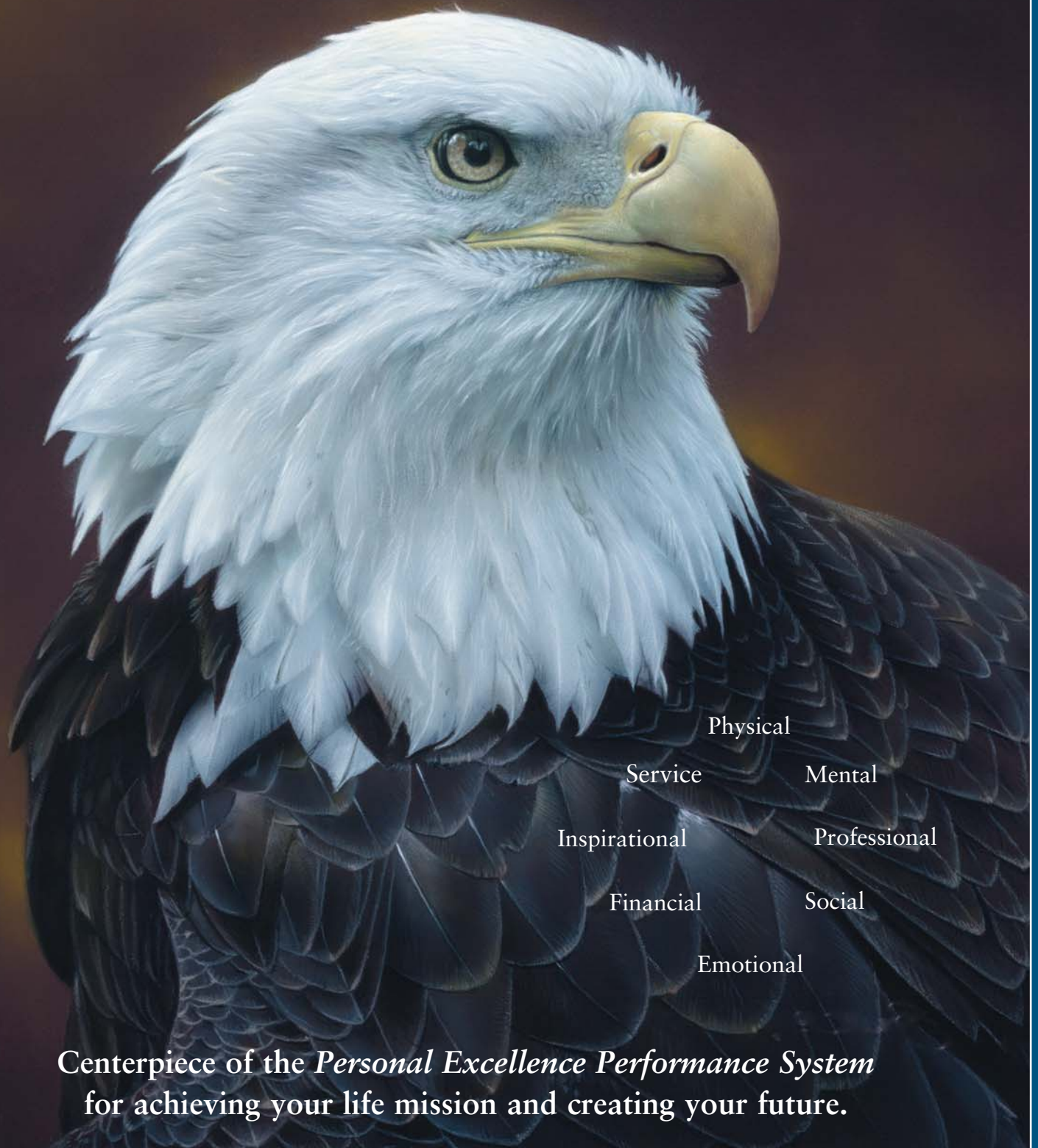


# Personal Excellence Plan

Revised Edition

© December, 2008 Leadership Excellence



Physical

Service

Mental

Inspirational

Professional

Financial

Social

Emotional

Centerpiece of the *Personal Excellence Performance System*  
for achieving your life mission and creating your future.



**Ken Shelton**  
*Editor in Chief*

*“Excellence is not only a matter of what we do and how and why we do it but also a matter of who we are—our personality and character—and what we accomplish with our time and talents.”*

*Use this plan as part of your Personal Excellence Performance System.*



**Personal Excellence**

- plan
- magazine
- books
- audio tapes/CD
- coaching
- online archive of articles

## Welcome to PERSONAL EXCELLENCE

For 25 years, we have published the best ideas on personal, team, and organizational development in the pages of three magazines: *Personal Excellence* (PE), *Sales & Service Excellence* (SSE), and *Leadership Excellence* (LE).

The *Personal Excellence Plan* (PEP) evolved out of our growing awareness and frustration that reading or hearing powerful ideas alone rarely results in sustained progress. Often lacking is real leadership, characterized by clear vision, mission, goals, commitment, action, correction, and support—elements that this plan and its performance system provide.

I first learned the value of a personal performance system in my formative years, ages 12 to 15, from a teacher/coach who awarded grades based on points earned by doing both academic and physical exercises.

This system made sense to me. I could see a sure way to grow and progress, step by step. So, starting simply from where I was at that point in time, I began doing the prescribed exercises.

What made a huge difference was having a friend who was equally committed to the development process. Together each day after school we would use the wonderful facilities of a nearby university to practice and perform. After three years of such preparation, we were ready to compete, and lead others.

Many people around the world have already benefitted from this performance plan and its companion publications. Now I invite you to experience personal excellence.

The *Personal Excellence Plan* is the centerpiece of the *Personal Excellence Performance System*—a family of tools to help you grow and progress in life, thus finding more joy and fulfillment.

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# INTRODUCTION TO THE PERSONAL EXCELLENCE PLAN

The *Personal Excellence Plan* is an achievement and performance program designed to help you find a wiser, better way to live your life, pursue your career, and lead your family, team, or organization.

If you subscribe to *Personal Excellence* magazine, you already know the value of powerful ideas to support your personal development. Now, the *Personal Excellence Plan* provides you with a proven system for putting those ideas and principles into action.

The *Personal Excellence Plan* recognizes the interrelationship that naturally exists among seemingly separate parts of your life. By making significant improvements in one key area of your life, you enhance other areas. As you define your vision, for example, you may wish to make changes in certain areas of your life that are out of alignment with that vision. The aim of the plan is to enhance every dimension of your life and to leverage your time and talents.

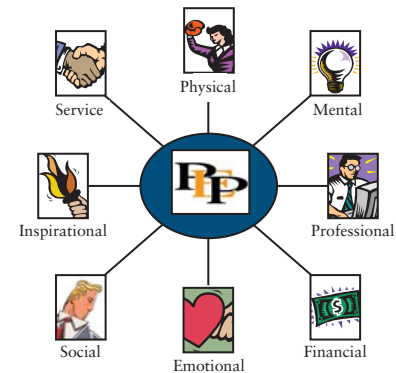
## What makes the Personal Excellence Plan so effective?

The *Personal Excellence Plan* has five unique features.

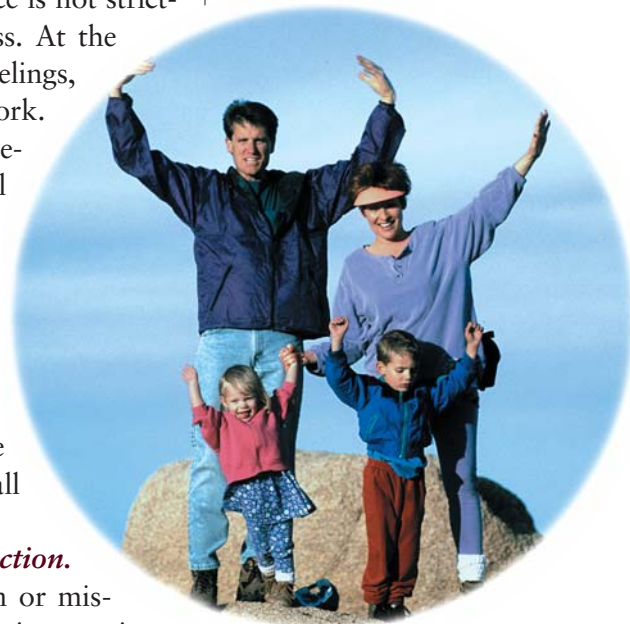
**1. The Personal Excellence Plan honors your dreams, aspirations, faith, intuition, feelings, and emotions.** Personal Excellence is not strictly a “left-brain” analytic, logic-based approach to success. At the start, and every step along the way, your dreams, desires, feelings, intuition, and faith play a vital part in making the plan work. In addition to defining the direction of your life, these creative “right brain” forces serve as visual and emotional sources of truth. They may also serve to suggest changes in direction, speed, priority, or partners.

**2. The Personal Excellence Plan integrates your personal life with your family and professional contribution.** Integrating your personal mission with your professional development and with the missions of the organizations you serve will enable you to make a more meaningful and mutually rewarding contribution in all dimensions of your life.

**3. The Personal Excellence Plan bridges vision and action.** While many achievement programs focus on your vision or mission, results occur only when that vision is translated into action. Through the *Personal Excellence Plan*, you gain access to leadership tools to leverage your time and talent, activate your faith, and work to make your vision a reality.



*By making connections with the eight dimensions of your life, you leverage your time and talents.*



“In my experience, successful leaders often are system thinkers. They focus less on day-to-day events and more on underlying trends and forces of change. They see interrelationships, not things; processes (scenes), not snapshots.”

—Peter Senge  
author,  
*The Fifth Discipline*

Family/Friend



Learner/Worker



Associate/Member



**4. The Personal Excellence Plan enables you to find harmony and synergy among the different roles and dimensions of your life.** Often while performing in one role or pursuing one goal, you can enhance another role or relationship, or make progress toward another goal, especially if you are aware of potential synergy. So, every time you make a plan or set a goal, look for the double and triple wins.

**5. The Personal Excellence Plan encourages a balanced, holistic, value-based, principled approach to life.** By having you do everything within the context of your life vision and mission, you set goals that reflect your best self and highest beliefs and principles.

## THREE PRIMARY ROLES

Your life is not one-dimensional. Everyone plays *three primary roles*. Like the primary colors, these roles encompass all other roles.

**1) Family/Friend:** You are always a son or daughter and friend, but you may also have several other family roles, such as husband or wife, aunt or uncle, niece or nephew, cousin or in-law, parent or grandparent.

“I plan my family activities first because if I don’t plan them, they either do not happen or end up being a hassle.”

—Zig Ziglar, author of *Over the Top*

**2) Learner/Worker:** You are always in some learner and worker roles. Your learner roles may include student, intern, teacher, trainer, apprentice, or trainee. Your worker roles may include homemaker, breadwinner, provider, job holder, professional, or boss.

“Is there such a thing as perfect work for you? Yes, because today it’s easier for you to customize a job to your desires and lifestyle.”

—Paul Edwards, author of *Finding Your Perfect Work*

**3) Associate/Member.** You are most surely a member or associate of some country, culture, club, church, association, organization, team, group, society, or cause.

“We change our world, our organizations, and ourselves with everything we do or do not do—and with each life we help or hinder.”

—Bill Halamandaris, founder of The Caring Institute

The *Personal Excellence Plan* will make you more effective and productive in each of these three roles. You are encouraged to see your life through the lens of these three primary roles and to see your goals as means to make you more successful in each of these roles.

## THREE-PHASE GROWTH PROCESS

*All success is a process.* The *Personal Excellence Plan* features three sequential phases of growth and progression:

**1) Vision.** This is where you look at the big picture. In the vision phase, you define your mission, purpose, dreams, and aspirations. This becomes the foundation for all goals and action plans as well as the motivation to face opposition and endure setbacks.

*“From your meditating and dreaming, bring back a sense that ‘with God, all things are possible.’ This is the field of infinite possibilities.”*  
—Wayne Dyer, author of *Handbook for the Soul*

**2) Performance.** This is the means to your ends. This is where your dreams meet the test of reality. You will engage in mission-critical steps of goal setting, followed by planning, organizing, prioritizing, and performing.

*“The more you feel in control of your life and your work, the more spirit, ambition, power, excitement, and initiative you will exhibit.”*  
—Nathaniel Branden, author of *Self-Esteem at Work*

**3) Support.** Without support, you will never fully achieve your vision. Too many improvement plans fail to account for the powerful *restraining forces* that keep you in your current life patterns. In this phase, you tap into powerful *sustaining forces* in the form of affirmations, coaching, accountability, and rewards.

*“To achieve great things, you need a coach or a mentor. You need to commit to somebody that you are going to make it happen.”*  
—Mark Victor Hansen, co-author of *Chicken Soup for the Soul*

*Approach the plan with wisdom and balance.* Do not undertake at one time more than you can reasonably accomplish. By following the principle of “line upon line,” you will grow toward excellence, toward the better future you imagine for yourself.

*Vision*



*Performance*



*Support*





Put your life habits in harmony with Mother Nature and Father Time.

“When you know exactly what you want and have the emotional strength to go after it, your mind and heart work together powerfully.”

—Nancy Anderson  
author,  
*Work with Passion*



# THE PERSONAL EXCELLENCE PLAN

## *Centerpiece of the Personal Excellence Performance System*

The *Personal Excellence Plan* is intended to move you *beyond instant gratification* and *counterfeit leadership* and strengthen your adherence to principles and practices that have passed the test of *Mother Nature* and *Father Time*. Nothing is more invigorating than working hard to fulfill a noble and worthwhile purpose. As you pursue a life mission and seek to achieve meaningful goals, you will grow in truth and light; your life becomes more abundant and rewarding.

This personal and professional development plan consists of three phases: Vision, Performance, and Support. In each phase, you will do certain exercises. The purpose of the plan is to put good ideas into action—to grow, improve, and progress toward your desired goals.

## Phase 1: Vision

In this “big picture” phase, you will seek either to discover your life mission, perhaps for the first time, or to redefine what your life might mean—what your direction, dream, mission, purpose, or aspiration might be.

### *Exercises in Life Vision and Mission*

Some ways of arriving at a vision or mission for your life come from *fear-based simulations*—others from *faith-based projections*. Either way can be effective. You are to select any one exercise or a combination of them to arrive at a statement of your life vision and mission.

**EXERCISE A:** Here are four exercises from the negative (fear-based) side. Choose the exercise that most appeals to you and record your response.

**1. Plan your own funeral.** What do you want to be remembered for? Imagine being present at your own funeral, listening to what is said about you by people who knew you well. What would you want them to say? What can you do now and in the future to ensure the funeral you desire?

**2. Conjure up ghosts.** Many stories in the literature of different countries and cultures tell of visitations from ghosts or spirits who either show people an accurate vision of their past, present, and future or frighten them into repentance. Imagine being visited by such ghosts or spirits and seeing an accurate reflection of your past and current condition, and the natural extension of your life patterns into the future. Do you like what you see? What vision is more to your liking? And what life mission will take you there?

**3. Assume real accountability.** We all understand the need to account as “stewards” for the talents, roles, or responsibilities we have been given. Imagine having a stewardship interview with a parent, teacher, boss, or spouse to assess your performance as a child, student, employee, or marriage partner. What vision and mission would allow you to give positive answers to tough questions?

**4. Face a final judgment.** In the belief system of most people is the idea of judgment, even a final judgment by an all-knowing God. Medical science and the stories of many people who have passed through near-death experiences verify not just the remote possibility but the virtual certainty of having our entire lives recorded and played back in an instant. What vision and mission for your life would ensure a favorable judgment?

**Response to Exercise A:**

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**EXERCISE B:** Here are five more exercises from the positive, faith-based side. Again, choose the exercise that most appeals to you and record your response.

**1. Imagine the highest and best use of talents, gifts, and abilities.** First assess what “natural” or acquired talents, gifts, abilities, skills, or traits you have. Next, envision what the highest and best use of these capabilities might be. See yourself as a source of good for your family, your organizations, and your society. Now, what might you be and do that would provide the greatest possible good to these entities and ensure a legacy you want to leave? Try to form a vision of you at your best, and compose a mission statement that is consistent with that vision.

**2. Find your joy ride.** Think of what makes you happy, fills you with joy, gives you satisfaction, provides you with meaning and a sense of fulfillment. Now, what life mission would bring you more of those rewarding, joyous feelings?



*“When it comes to matters of self-esteem, I have more to fear from my own judgment. In the inner courtroom of my mind, mine is the only judgment that counts.”*

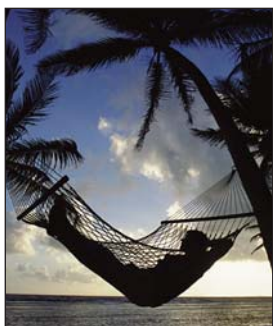
—**Nathaniel Branden**  
author,  
*The Six Pillars of Self-Esteem*



*Find your joy ride.*

“Each of us lives according to a unique set of governing values. These values are the things that are most important to you. They are represented by the clearest answers you can give to these questions: ‘What are the highest priorities in my life?’ and ‘Of these priorities, which do I value most?’ ”

—Hyrum W. Smith  
author,  
*Ten Natural Laws*



How might you turn your dreams into reality?

**3. Identify what you value most and least.** With what purposes do you most identify? From the following list, *circle five words* that are most important to you. *Cross off the five words* that mean the least to you.

Achievement	Fun	Relationships
Adventure	Health/Fitness	Religion/Spirituality
Challenges	Helping Others	Reputation
Community Service	Harmony	Responsibility
Competence	Independence	Security
Cooperation	Intellectual Pursuits	Self-actualization
Decisiveness	Involvement	Self-respect
Dignity	Loyalty	Status
Economic Security	Meaningful Work	Time to Yourself
Excitement	Money	Truth
Fame	Nature	Wealth
Family	Personal Development	Wisdom
Freedom	Personal Growth	Working Alone
Friendships	Privacy	Working Together

As you look at your top five and bottom five purposes, ask yourself, “Is my life now in alignment with these values? How would my life be different if I truly practiced these values? Are the values that are most important to me prominently represented in my life mission statement?”

**4. Dream on.** You may dream, night or day, about many things: travel, vacation, adventure, romance, cars, homes, money, spouse, children, family, profession, benefits, friends, education, activities, entertainment, body weight and shape, spiritual life, creative venture. Reflect for a moment on what you dream about. How might you make your most worthy dreams part of your life mission and turn them into realities?

**5. The professional crusade.** You will experience increased power and purpose as you link your personal mission with that of the organizations you associate with. You transform your work from a career to a crusade. Imagine yourself working with or for an organization that represents the best possible fit with your personal mission (you may have to start it). Explore the link between your personal and professional missions.

*Note: Personal Excellence strongly advocates loyalty to employers and decries capricious job hopping and irresponsible on-the-job performance in the name of self-interest. Indeed, this plan encourages any person currently employed to make a greater contribution at work. But, when either you or your employer suspects a bad fit between the job or employer’s interest and your capability or interest, you should both consider making a change in the best possible way.*



**Response to Exercise B:**

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***Statement of Vision and Mission***

Now that you have taken one or more of these exercises, write a short statement of your life vision and mission. As you write your statement(s), reflect on your responses to Exercises A and B. If you complete these exercises honestly and carefully, they should provide direction to the kind of life vision and mission you want to pursue. Your life vision and mission, based in the principles you want to govern your life, will challenge and motivate you to bring out the best in yourself and others.

*You may want to compose one statement each for the personal, family, and professional dimensions of your life.* If the mission involves other people, you will naturally want to involve them (perhaps members of your family or team) in writing the statement. You may also try to correlate your personal/family/professional missions with those of the organizations you associate with, working toward the ideal of close alignment.

**My life vision (what I can see and believe myself becoming):**

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**My personal mission statement (what I believe my life mission to be):**

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*“In one sense, it is extremely important to get this expression of mission down on paper. The very process of writing brings a crystallization of thought and distills learning and insights into words. It also imprints the brain, reinforces learning, and makes the expression visible and available to others.”*

—**Stephen R. Covey**  
author,  
*Principle-Centered  
Leadership*



“A family mission statement is meant to be the literal constitution of your family life. And just as the United States Constitution has survived for more than 200 turbulent years, your family constitution can be the foundation document that will unify and hold your family together for decades—even generations—to come.”

—Stephen R. Covey  
author,  
*Seven Habits of Highly  
Effective Families*



### **Speciality Mission Statements**

We highly recommend that you also write one or more of the following speciality statements as amendments to your life constitution:

#### **1. My homemaking/marriage/parenting/family mission statement.**

Regardless of your current status—single, living with another person, engaged, married, divorced, single parent, married with children, empty nester, grandparent—you may wish to express an immediate “homemaking” mission that captures your current situation and future aspirations relative to your home and family. If this takes the form of a “family” mission statement, you might involve other family members in creating this statement.

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**2. My work, job, career, profession, or contribution mission statement.** This statement is an expression of the work-related contribution you wish to make in your lifetime.

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*Note: If you are currently a full-time homemaker with young children at home, your primary focus for the next decade may be to raise responsible children. Still, you might consider writing a statement that reflects the meaningful contribution you wish to make in your life through the application of some special talent or capability you have. Even if in the near term you only find two hours a week to cultivate this talent or make a modest contribution, this commitment might grow to 20 hours a week or more as your children grow and mature.*

**3. Personal/organizational correlation statement.** This statement expresses how your personal and professional vision/mission correlates with the vision/mission of the teams or organizations you serve.

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*Note: If you find that there is currently little or no correlation between your personal mission and the mission of the organization you work for, you may want to make a change soon in your employment.*

## Phase 2: Performance

In this phase, you will consider the different dimensions of your life, set meaningful goals in each dimension, and use these to assist in monthly planning, weekly organizing, and daily prioritizing. This “whole life” approach to personal and professional development will enable you to convert your mission and dreams into action and reality.

### *Setting Annual or Seasonal Goals*

Start a lifetime program of setting and achieving worthy goals to sustain self-improvement and professional advancement. Be honest and soul-searching as you select your goals. Once you select your goals, commit yourself to achieve them and surround yourself with sustaining forces.

**Great goals.** Your goals should meet six criteria:

- ❑ **Personal and visual:** You can see yourself achieving the goal.
- ❑ **Positive or inspiring:** The goal is worthy of your time and effort.
- ❑ **Written and shared:** The goal is recorded, displayed, and reviewed.
- ❑ **Specific and action-based:** You specify what you will do.
- ❑ **Challenging but achievable:** The goal causes you to “stretch.”
- ❑ **Measurable and accountable:** You know if you achieve the goal, account for your performance, and reward yourself for progress.

**Sample goal.** For example, suppose that you write the following goal: *In the next 12 months, I will learn to speak the Spanish language with sufficient fluency to carry on a limited conversation with a native speaker for either business purposes or tourism.*

When you *anticipate the opposition or resistance* you will face in trying to achieve your goal, you need to devise a strategy and plan for overcoming conflicts and obstacles: “I will devote nine hours (three nights) per week to formal Spanish classes and practice speaking at least 30 minutes per day with my Spanish-speaking friends and colleagues.”

You also need to *find a way to measure progress and reward yourself* along the way. For example, “After one year, I will converse with confidence in certain subject areas with a Spanish-speaking native. I will take a two-week vacation to Spain at that time.”

Basically, setting a goal and planning to achieve it is as simple as deciding *what to do* and *how to do it*. Recognize that each life dimension represents a continuum—a low end and high end of achievement or mastery. *Make an honest assessment of where you currently are in each life dimension before you set goals.* Remember that some steps must naturally come before others to achieve excellence.

Now, within the context of your life mission, *set at least one annual or seasonal goal in each of the eight universal life dimensions.*

*I visualize where I want to be and what kind of person and player I want to become. I approach the game or goal with the end in mind. I know exactly where I want to go, and I focus on getting there. As I reach those goals, I gain a little more confidence.”*

—Michael Jordan  
MVP of the NBA

### SMART Goals

*Here’s another way to evaluate your goals—use the acronym SMART:*

S: specific  
M: measurable  
A: actionable  
R: realistic  
T: time-based

*If your goals are not SMART, they may make you feel rather DUMB:*

D: disillusioned  
U: uninspired  
M: mediocre  
B: beaten

### Core Desires

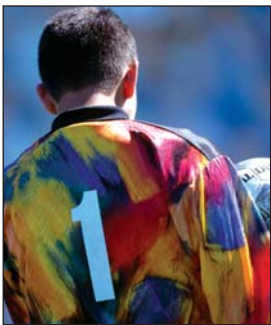
*Make sure your goals reflect the desires of your heart and work first on those that generate the most intense interest. When you see dramatic progress in one area of your life, you are motivated to improve other areas.*

# 1. Physical: Health & Fitness



*“Live actively and connect physical activity to other parts of your life. While exercise may become a part of your life, active living is a way of life, as all things are related and affect one another. Our individual actions all add up. They can make a difference, for better or worse.”*

—**Gordon Stewart**  
author,  
*Active Living*



*“Exercise regularly. For heart conditioning and for strengthening, exercise at least three times a week for 20 minutes at 75 percent of your maximum predicted heart rate.”*

—**Robert S. Eliot, M.D.**  
author,  
*From Stress to Strength*

The physical dimension is foundational, as it entails taking wise care of your body, your best resource for achieving your life mission. Your ability to maintain proper health and fitness will impact all other dimensions of your life. **Key concepts** include: fitness, exercise, diet, sleep, wellness, prevention, healing, recovery, recreation, appetites, discipline, habits, addictions, nutrition, hygiene, and appearance.

*You may choose to establish a physical fitness program*, tailored to your needs, to help you reach a higher level of health or to participate in regular physical fitness activities, athletic sports, games, or recreational activities such as swimming, diving, golf, tennis, basketball, bowling, skiing, skating, football, cycling, back-packing, or hiking.

**Your goals** may be to practice wise eating, drinking, and sleeping habits; bring your weight to an appropriate level; improve your personal appearance and attractiveness through physical health and fitness, an optimistic attitude, personal charm and friendliness, posture, voice, disposition, good grooming, and proper attire. Remember: medical consultation is recommended when you contemplate making a significant change in physical exertion. Whatever your current physical condition or limitation, always select goals within your physical capacity.

Record here at least one goal in this physical dimension of your life.

**Fitness/Exercise:** \_\_\_\_\_

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**Diet/Habits:** \_\_\_\_\_

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**Weight/Appearance:** \_\_\_\_\_

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## 2. Mental: Learning & Education

The unlimited capacity of the human mind to learn and grow will be your most powerful tool in fulfilling your mission. *Key concepts* in this life dimension include: intellectual growth, teaching, training, reading, speaking, studying, writing, discovering and developing talents, creative expression, formal education, and continuing education.

*You may choose to undertake a reading program* of outstanding literature that either reflects a variety of interests or focuses on one theme. Pursue an interest in any creative field (such as poetry, fiction, music composition, art, dance, crafts, photography, drama) or in a hobby (such as woodwork, astronomy, nature, coin or stamp collections). You may participate in an area that is new to you, exercise a talent you have already developed, or gain more knowledge and intelligence in a field related to your work. Pursue excellence to the point of performing, exhibiting, or publishing. Expand your cultural appreciation by completing a one-year study program of an art form, such as operas, symphony concerts, theater, museums, ballet, or folk dancing. Enlarge your cultural appreciation by regularly attending cultural events in your area.

*Your goals* may be to participate in a book group or study group or travel group to learn more about countries, cultures, and languages. Improve your knowledge in a specific field, such as history, science, literature, political science, or philosophy. Where possible, attend classes or lecture series in your chosen field. Develop basic speaking and writing skills in another language. Assemble, write, and publish a history of a family, team, tradition, church, or community. Or, take classes at a college or university. Perhaps seek an advanced degree.

Write here at least one goal in this area.

*Reading/Knowledge:* \_\_\_\_\_

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*Talents/Interests:* \_\_\_\_\_

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*Education/Training:* \_\_\_\_\_

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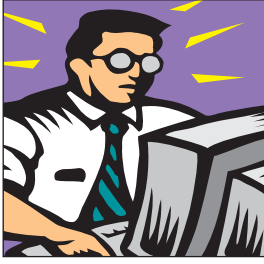


*“Excellence is not something attained and put into a trophy case. It is not sought after, achieved and, thereafter, a steady state. It is a momentary phenomenon, a rare conjunction of body, mind, spirit at one’s peak. Should I come to that peak, I cannot stay there. I must start each day at the bottom and climb to the top. And then beyond that peak to another and yet another.”*

—George Sheehan, M.D.  
author,  
*Going the Distance*

*“To become champions, we must rise above our comfort zones again and again, breaking new ground each time, expanding our knowledge and experience and rising to new and ever greater challenges.”*

—Andrew Wood and  
Brian Tracy  
coauthors,  
*The Traits of  
Champions*



### 3. Professional: Job, Career, or Contribution

Having satisfying and stimulating work will infuse all other life dimensions with vitality and meaning. *Key concepts* in this dimension include skill development, professional development, job hunting, interviewing, competence, on-the-job performance, promotions, pay raises, networking, image enhancement, entrepreneurship.

Today, organizations provide the framework for managing careers, but they also ask you to take responsibility for your own career plans. The workforce of the future is expected to be one-third self-employed, one-third independent contractor, and one-third traditional employees. How can you best perform in such a work world? Progress toward a new or better position comes from your work and drive, from a sense of direction and meaningful contribution.

*You may choose to link your career goals to your organization's business mission.* Create your own career development strategy. Keep current in the literature of your field. Understand business principles and apply them to your work. Acquire greater proficiency in your profession, job-related occupation, or homemaking area.

*Your goals* may be to gain profit-centered responsibility in a management position. Prove yourself as both a specialist with particular expertise and a generalist who can exercise leadership. Gain more experience in the company's core business. Learn how to add more value to your organization's products, programs, or services. You may seek a challenging position at home or in another country. Broaden your base of knowledge and experience to ensure career flexibility.

Now, set one or more goals in this area.

**Professional Development/Advancement:** \_\_\_\_\_

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**On-the-Job Performance/Contribution:** \_\_\_\_\_

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*"If you barter ultimate control of your professional life in return for the security of a 'guaranteed' future, you also hand off the responsibility of your career. No one—no boss, no company, no government—has the ability, interest, or ultimately the right to control your career. Your career is your responsibility and yours alone. A career isn't a series of jobs. It is something you create and carry with you. It's a collection of skills and accomplishments, and it evolves over time."*

—James C. Cabrera  
author,  
Parting Company

*"Success. It's not the neon lights and the publicity. More often, it's the small steps to make you stronger and to keep you well, measured against simple goals."*

—Dave Thomas  
founder of  
Wendy's International

## 4. Financial: Money & Asset Management

Your financial condition will either enhance or restrict your ability to pursue your vision. With greater financial resources and the spirit of service, you could do more to bless the lives of others. The financial dimension explores not only the accumulation of assets, but their proper allocation and use. It recognizes the interrelated nature of your financial well-being with that of the other six dimensions of your life.

**Key concepts** include: asset management, wealth creation, budgeting, investing, purchasing, consuming, spending, getting full value and worth as a customer or shopper, protection, maintenance, tax planning, planned giving, accounting, and forecasting.

**Your goals** may include establishing an investment plan with specified monthly contributions. You may choose to work with a financial planner or investment advisor in developing your goals, or read books that will make you a more informed and capable investor.

**Your goal could be to develop a personal budget**, achieve greater benefit from your discretionary income, reduce your consumer or credit card debt by a particular date, or reduce your tax burden through more careful planning. When you consider your role as a consumer, you may want to set goals that reflect wiser, less impulsive spending habits and more value-directed purchases. You may also consider setting financial goals that are more directly related to your business or professional objectives.

Now, set at least one challenging goal in this life dimension.

**Earnings/Compensation/Profit:** \_\_\_\_\_

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**Financial/Investment/Savings/Spending Plan:** \_\_\_\_\_

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*“A feeling of freedom is essential to achieving other goals, and you can’t be free until and unless you have enough money so that you are no longer preoccupied with it. One aim in life must be to provide for your own financial independence, without self-delusion, procrastination, or trusting to luck.”*

—**Brian Tracy**  
author,

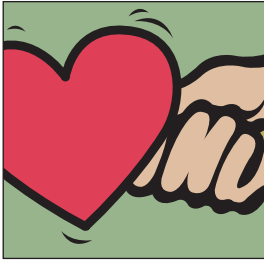
*Success Is a Journey*



*“When it comes to investing, there is no one right answer. One size does not fit all. Determine what you want to accomplish, and then make sure it happens.”*

—**Mary Farrell**  
author,

*Beyond the Basics*



## 5. Social/Emotional: Relationships with Self, Family, & Others

*“When you plan things with your family, make the commitment to follow through as you do on your job. A promise to take the family camping, to the zoo, on an outing, or to the game is ultimately just as important to your success as your integrity to your job responsibility. My commitment to give my loved ones time is just as important as my commitment to provide them with food, shelter, clothing, and some of life’s goodies.”*

—Zig Ziglar  
author,  
*See You at the Top*

*“The only escape from the swamp of Self is the instinctual and lifelong engagement in the fate of others—the involuntary discovery that there are lives that mean as much or more to you than your own. It’s the discovery that comes with being an essential member of a family.*

—Midge Decter  
Trustee of The  
Heritage Foundation

This may be the most difficult life dimension, but it has the potential of being the most richly satisfying. *Key concepts* include friendship, marriage, family relations, children, social graces, etiquette, emotional intelligence, interpersonal communication, work relationships, resilience, maturity, social intelligence, stress, self-awareness, self-esteem, self-knowledge, and people skills.

You may choose to strive to apply the principle of going the “second mile” in all your dealings with others by doing more than is expected of you. Do to others what you would have them do to you, in the spirit of the Golden Rule. Make promises and commitments carefully. When you make a promise or commitment, count it as your sacred word of honor, and act accordingly.

*Your goals* may be to cultivate friends and companions who keep high ideals. Develop a love for and dedication to honorable, meaningful work. Cultivate patience, tolerance, and love for family members, roommates, and other associates. Acknowledge mistakes and apologize when appropriate to make things right if you have given offense.

Review your life and dealings with other people and set at least one goal in an area or relationship you feel needs improvement.

**Self-esteem/Self-talk:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Friendships/Relationships:** \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Family Relations:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## 6. Inspirational: Character & Soul

As you develop your character, increase your faith, and turn to a higher source for life direction, you add value, meaning, and purpose to every other dimension. **Key concepts** include your personal convictions, integrity, honesty, enrichment, inspiration, intuition, belief, faith, religion, inner peace, influence, purpose, meaning, identity.

David O. McKay wrote: “Every noble impulse, every unselfish expression of love, every brave suffering for the right; every surrender of self to something higher than self; every loyalty to an ideal; every unselfish devotion to principle; every helpfulness to humanity; every act of self-control; every fine courage of the soul, undefeated by pretense or policy, by being, doing, and living of good for the very good’s sake—that is spirituality.”

You may wish to evaluate your personal standards of honesty and integrity and resolve to tell the truth and be honest in your dealings and relationships. You may choose to eliminate pride and envy. Avoid gossip and backbiting, doing or saying things that hurt or offend others. Honor confidences entrusted to you. Resolve to lead a morally clean life. Give proper credit for the work of others in conversation or composition. Strengthen your spirit by fasting, prayer, and meditation. Engage in a program of serious scripture study or of reading inspirational books.

**Your goals** may be to increase the power of prayer in your life. Create a file of ideas, quotations, thoughts, anecdotes, scriptures, and inspirational stories. Use these materials in speaking or teaching. Keep a personal journal. Record memorable experiences, events, goals, thoughts, and feelings. Complete a class, course, or individual study program. Complete at least four generations of a family pedigree chart. Write a family history, relating incidents, backgrounds, and experiences.

The development of high and noble character is foremost in the pursuit of *Personal Excellence*. Set at least one goal in this life dimension.

**Reading/Study:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Meditation/Prayer:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Journal/Family History:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



*“A conscience is trained through personal reflection. But without a commitment to the truth, personal reflection will result only in rationalization. Disciplined reflection does not take time away from work; it sustains the spirit and increases the intensity and quality of work.”*

—Keshavan Nair  
author,  
*Beyond Winning*

*“We must recollect our original spiritual and moral substance, which grew out of the same essential experience of humanity. I believe that this is the only way to achieve a genuine renewal of our sense of responsibility for ourselves and for the world.”*

—Vaclav Havel  
President of  
Czech Republic



## 7. Service: Citizenship, Stewardship, & Leadership

*“This life is transient and ephemeral. Success and failure as popularly defined are really impostors. We find meaning with our hearts and our minds and our hands and our souls when we have the opportunity to serve another human being.”*

—Paul Hawken  
author,  
*Growing a Business*

Self-development without service and citizenship makes us self-centered. *Key concepts* include good deeds, charitable service, random acts of kindness, social responsibility, church activity, neighborliness, coaching, mentoring, volunteer work, stewardship of resources, private leadership initiatives, government involvement, teams, clubs, and local or national associations. Perform service without seeking acclaim or reward.

You may choose to give special service to your own family. If you are not living at home, this service may involve roommates or members of a team or group. Give service to the church or cause of your choice, to people outside your immediate family. Teach an art or a skill to someone in need. Be a friend to one or more children who are in need or at risk. Take others to worthwhile programs or activities, such as cultural or athletic events, camping trips, or outings. Assist the elderly, divorcees, those who live alone, or other people who need help with chores. Befriend new members of your neighborhood, church, club, team, family, or community, and assist them in making the transition.

*Your goals* may be to write uplifting and encouraging letters regularly to a missionary, serviceman, friend, or relative. Visit people whose activities are restricted—such as those in nursing homes, hospitals, or prisons—to bring them hope and encouragement; participate in projects and activities, read to them, or provide books and magazines. Assist a child who needs help with homework or cultural enrichment. Coach a team, serve as a youth program director, direct a community or neighborhood drive, or assist a school teacher. Help support a young person who desires to be a student or missionary but lacks funds. Go beyond what is requested or required in your service to a church, volunteer, or nonprofit organization.

Now, set at least one goal in this important dimension.

### GOAL CHECK

*Are my goals...*

1. Personal and Visual
2. Positive and Inspiring
3. Written and Shared
4. Specific and Action-based
5. Challenging but Achievable
6. Measurable and Accountable

*Do they help me fulfill my three primary roles:*

1. Family and Friend
2. Learner and Worker
3. Associate and Member

*Are my goals aligned with my life vision and mission?*

*Do my goals reflect my core desires?*

*Do I have sufficient support to achieve my goals?*

*Letters/Visits:* \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Children/Youth:* \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Citizenship/Community Service:* \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# THE 90-DAY SMART START

## Prioritize Your Personal Development Goals

Now, review the goals you have set in each of the eight dimensions. Don't worry about trying to do something about each of them now. Simply answer this question: What matters most to me now? During the next 90 days, what can I start doing, at least with my *top priorities*?

In the space provided, select three priority goals from among those you have set in the eight dimensions. Write them here as SMART goals (specific, measurable, actionable, realistic, and time-based) for the next 90 days. Doing any activity for at least 30 days creates a new habit.\*

**Priority 1** \_\_\_\_\_

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**Priority 2** \_\_\_\_\_

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**Priority 3** \_\_\_\_\_

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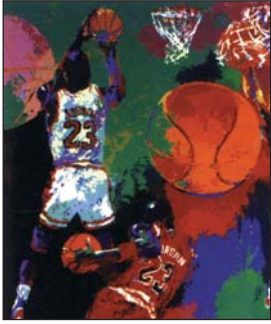
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\* You may wish to copy this form and do this exercise every quarter, as you will likely want to adjust your priorities and goals periodically.



“I have the goal of being the best, but I approach everything step by step using short-term goals. When I meet one goal, I set another reasonable goal I can achieve if I work hard. Each success leads to the next one.”

—**Michael Jordan**  
author,  
*I Can't Accept  
Not Trying*

### This Month's Priorities/Goals

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

## Planning, Organizing, & Prioritizing (POP)

With your life mission and annual or seasonal goals in front of you, you are ready to engage in monthly planning, weekly organizing, and daily prioritizing. If you skip these disciplines, requiring about six hours each month, you will likely compromise your goal quest.

- ❑ **Monthly Planning:** This 30-minute activity enables you to connect your life mission and annual or seasonal goals with your monthly calendar.
- ❑ **Weekly Organizing:** This 15-minute activity causes you to connect your monthly plan with your weekly activities and events.
- ❑ **Daily Prioritizing:** This 10-minute activity requires you to decide what needs emphasis or attention that day. In performing, you may need to make a few adjustments as you go.

### Exercise A: Monthly Planning

Using a current monthly calendar page, go through an exercise in monthly planning.

**Context.** Life mission and annual or seasonal goals.

**Commitments.** First, list the commitments, duties, and plans that you have made for the month. Examine these to make sure that they are all still valid. You may wish to make some changes. Schedule these pre-commitments and other high priorities first on your monthly plan.

**Goals.** Decide what you will do this month in support of your goals. You may need to emphasize some goals over others in this time period. Seek synergy among goals where possible.

**Choices.** Next, identify what might be considered “discretionary time” and decide what you will do with that time. These choices may need to be made with other people who live or work with you. Find or make some time to call your own. Make choices that are consistent with your principles, plans, goals, and priorities.

#### Monthly Planning Principles:

1. Spend a couple of minutes reviewing your annual goals.
2. Determine what emphasis is most appropriate for this month.
3. On the monthly planning calendar, list any commitments, duties, or plans you have for the month.
4. Organize your time around your priorities and goals.
5. Make best use of your “discretionary time.”

## Exercise B: Weekly Organizing

Using a week-at-a-glance form, do an exercise in weekly organizing.

**Context.** Life mission, annual goals, monthly plan.

**Commitments.** What commitments and other priorities flow into this week from your monthly plans? Again, examine these to make sure they are still valid. Make some changes if necessary.

**Goals.** Choose what you will do this week to meet your goals.

**Choices.** Makes smart choices about the time that remains.

### Weekly Planning Principles

1. Review your monthly goals and write specific weekly goals.
2. Record your commitments and plans on your week-at-a-glance schedule.
3. Schedule activities to meet your goals—note these on your daily schedule.
4. Connect your goals. For example, you might take your family on an outing once a week to meet both a physical and social goal.

## Exercise C: Daily Prioritizing

Using a daily planning page, perform an exercise in daily prioritizing.

**Context.** Life mission, annual goals, monthly plan, weekly compass.

**Commitments.** In most cases, once your plans and promises show up on your daily calendar, you meet them head-on with enthusiasm.

**Goals.** Choose what you will do each day to progress toward goals.

**Choices.** Make wise choices about your discretionary time.

### Daily Performance Principles

In the performance of your daily plan, keep six principles in mind:

**1. Things that matter most should not be at the mercy of things that matter least.** So, work on top priorities first, and guard against relatively unimportant and seemingly urgent things.

**2. Honor prior commitments whenever possible.** Don't use the mood of the day as an excuse to cancel at whim prior appointments.

**3. Even the best plans sometimes need to be altered, even aborted.** On the other hand, recognize that genuine emergencies can arise, along with new opportunities that may take precedent over prior plans.

**4. Work like a soul inspired until the battle of the day is done—and then reward yourself.** This old maxim makes sense whenever you are trying to achieve something meaningful.

**5. Look for moments of fun, humor, recreation, serendipity, spontaneity.** There are moments in every day, even the most demanding, when you can smile, laugh, and relax.

**6. Let your conscience be your guide.** Keep in touch with a sensitive conscience, a sense of what is right and best in a particular situation.

*“Always ask the question, ‘What do I want to be remembered for?’ It is a question that induces you to renew yourself as the person you can become.”*

—Peter Drucker

author,  
*The Effective Executive*

*“Nothing is less productive than to make more efficient what should not be done at all.”*

—Peter Drucker

author,  
*Innovation and Entrepreneurship*

### Today's Goals and Priorities

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

“Masters use the mind to simulate championship performances. Learn how to live in your imagination, since visualization plus internalization equals realization. Learn also how to create mental holograms of excellence; and how to apply scientific breakthroughs in sports science to every area of your life.”

—**Denis Waitley**  
author, *Empires of the Mind*

“The common characteristic of ‘winners’ is not what, but how they think. All of them know the importance of a clear vision, a sense of purpose or mission, and clearly envisioned and articulated goals. They develop tremendous resiliency, great faith in their abilities, and self-talk that constantly affirms their own value. They feel deeply connected to the world in which they live and fully accountable for their actions.”

—**Lou Tice**  
author,  
*Smart Talk*

## Phase 3: Support

In this phase, you reinforce your goals and priorities by engaging in some supportive disciplines such as coaching, affirmation, and accountability. These sustaining forces help you counteract opposition and overcome resistance.

After you have defined your life mission, goals, plans, and priorities, you can expect opposition—this too is a natural law. To overcome the forces of opposition and resistance—the pull of old patterns, the lull of indecision and procrastination, the power of certain addictions, the comforting sameness of ruts and routines, the compromise of principles, the non-commitment of current “friends” and companions—you will need to focus on the payoffs and rewards and rally supportive resources.

### *Six Exercises*

The following six exercises will provide you with powerful sustaining forces and enable you to achieve your goals.

**1. Visualization—See it to believe it.** Almost all peak performers practice and perfect the art of visualization wherein they see themselves doing well at what they plan to do. So, when you set a goal, see yourself achieving it—and see it in every imaginable detail.

**2. Affirmation—Treat future possibility as present reality.** Affirm your ability to perform on demand. Over time, this practice leads to a high degree of professionalism. Imagine all the good things that will come of it. Affirm yourself every day along the way. Make your affirmations personal (first person), positive, present tense, visual, and emotional.

**3. Motivation and inspiration.** To sustain motivation and discipline, seek inspiring sources of support and reward yourself regularly for right behaviors that represent progress. Seek experiences that build your faith, boost your spirits, or brighten your days. Review your *Personal Excellence Plan* regularly to sustain motivation to achieve your goals. *Personal Excellence* and *Executive Excellence* magazines are designed to keep you motivated and inspired.



**4. Create your own resource center.** Make a list and keep an active file of products (books, tapes, videos, CDs, tools) and programs (live or televised speakers and seminars) that keep you on track. Build a personal library of your favorite resources and seek affordable access to additional resources.

*“Put the odds of winning in your favor. List your resources, and learn from people who have achieved what they have conceived.”*

—Bonnie St. John Deane, author of *The Winning Spirit*

**5. Personal Coaching and Cheerleading.** It’s hard to win when nobody is on your side, rooting for your success. So, identify human resources—people such as friends, cheerleaders, coaches, mentors, trainers, teachers, and parents—who are supportive of your aims and goals. Make time to discuss your goals, plans, and progress with these people. Coaching and cheerleading are the single most powerful supports to achieve your goals.

**6. Keep a personal journal or scorecard.** Evaluate your progress toward meeting your goals at least once each month. Record your progress and achievement in your *Personal Excellence Journal*. Keep score on your goals. Account to someone regularly for your progress.

This three-phase plan—**VISION, PERFORMANCE, and SUPPORT**—will enhance the three primary roles you play in your life (Family/Friend, Learner/Worker, and Associate/Member) and provide you with a simple way to set and achieve goals in the eight dimensions consistent with your life mission. **Remember:** Success in one dimension is often very poor compensation and consolation for failure in other dimensions. When you achieve whole life success, the purpose of the *Personal Excellence Plan*—to help you find a wiser, better way to live your life and lead your organization—will be fulfilled.

*“I encourage you to make a little more effort and show more self-discipline in the direction of excellence not only in your work but also in your lives. This is a great day of preparation and performance for you—a time to begin something that will continue as long as you live.”*

—Gordon B. Hinckley, past president of The Church of Jesus Christ of Latter-day Saints



*“Who have your best mentors been and what have they done for you? I’ll bet that they were people who could see more in you than you could see in yourself.”*

—Lou Tice  
author,  
*Coaching for Results*

*Personal Excellence  
Magazine*



**The Perfect Resource.** *Personal Excellence* magazine is the best possible support to your *Personal Excellence Plan*. If you’re not already a subscriber, call us today at 1-877-250-1983.

# HOW YOU CAN MAKE THE MOST OF YOUR PERSONAL EXCELLENCE PLAN

*Setting goals often becomes an exercise in frustration.* In fact, rather than lead to growth, improvement, progress and positive change, this *Personal Excellence Plan* may lead only to a sense of failure—or a paralysis of analysis. As Stephen R. Covey has said, “Make the plan your servant, not your master.”

*To make the most of your plan,* I recommend the following guidelines:

*Start with your passion.* What are you most excited about? What seems to be your highest priority? Of all the things you might do, what is the *one thing* you feel you *must* do now? This one thing might be in just one are of the *Eight Dimensions of Personal Excellence*—or it may touch on two or three dimensions.

*Lead with your heart.* What is your heart set on being or achieving? In what direction is your heart leading you? What cries out to you for time and attention today? What matters most to you? Answering these questions will give you direction each day.

*Find peace and joy in progress.* You may never attain some of the goals you set in this plan. But let this plan serve as a blueprint for

your life. Making progress in any one of the *Eight Dimensions of Personal Excellence* can be exhilarating and rewarding, boosting your self-esteem and leading to desired results. So, be at peace with yourself and enjoy the journey.

*There is a time and season for all things.* At different ages and stages of life, different goals and dimensions of your plan may be more important to you. This is natural. Enjoy each season of life as you would a season of the year. Give joyful expression to your dreams of the time and your desires of the season.

*Little daily disciplines pay big dividends.* At any given moment, you may well feel that you’ll “never get there from here.” But by making good use of Sundays to regain perspective and recharge your spiritual batteries, you’ll have the courage to carry on and keep on doing those little things daily that eventually bring about the fulfillment of your dreams.

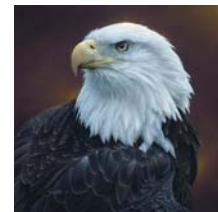
May you feel joy in your experience with the *Personal Excellence Plan and Performance System*.

*Ken Shelton*

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