

Life Strategy

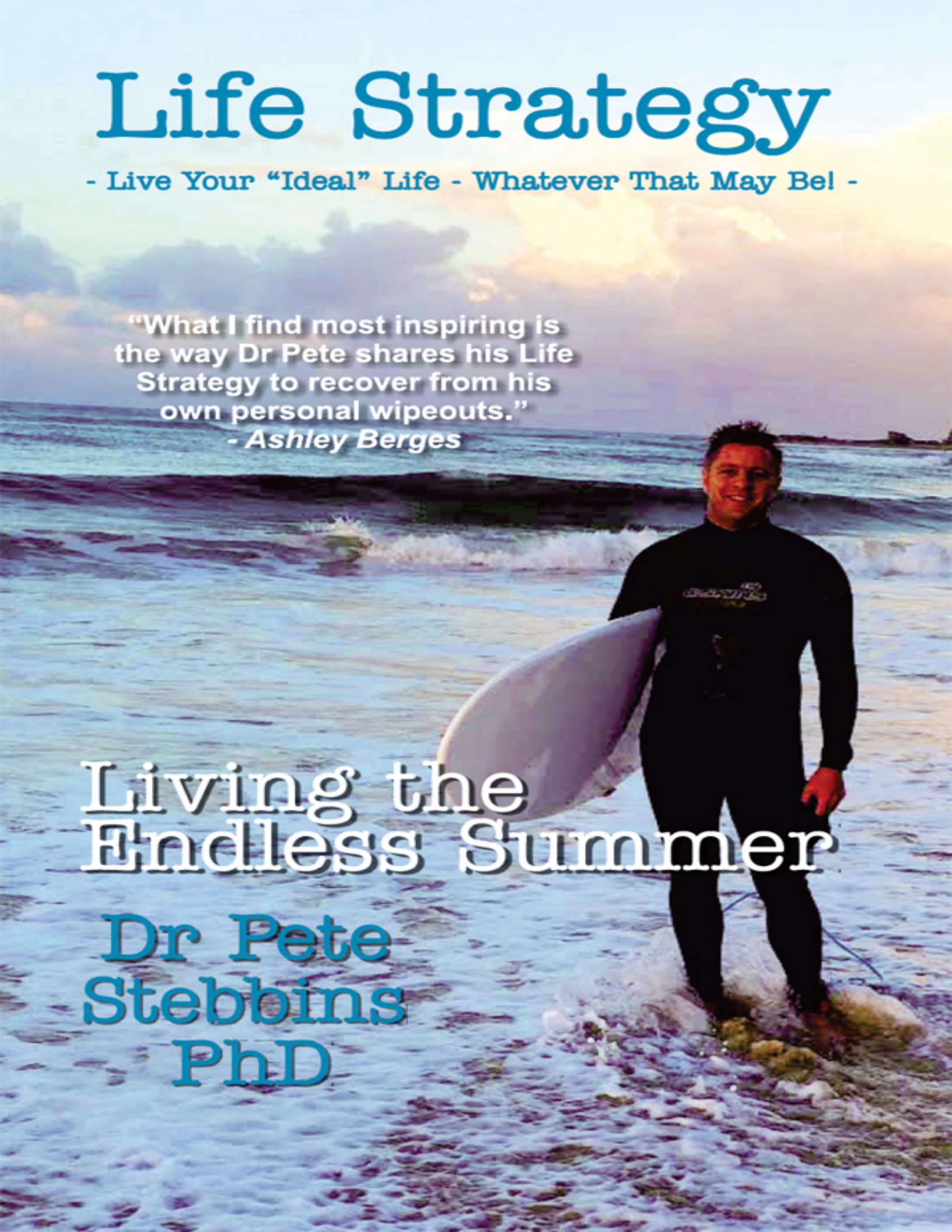
- Live Your "Ideal" Life - Whatever That May Be -

"What I find most inspiring is the way Dr Pete shares his Life Strategy to recover from his own personal wipeouts."

- Ashley Berges

Living the
Endless Summer

Dr Pete
Stebbins
PhD



LIFE STRATEGY

Living The Endless Summer with Dr Pete, PhD

Dr Pete, PhD
The Stress Surfer



A book by The Stress Surfer

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The Stress Surfer, PO Box 621, Albion, Queensland, 4010, Australia

TheStressSurfer.com

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To Maya, Skye and Summer

May you successfully navigate the distance between the dreams and ambitions in your souls and the challenges and opportunities of your lives!

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ABOUT DR PETE

DR PETE, PHD, IS A LEADING psychologist, life coach and facilitator with a personal and professional journey full of both achievements and challenges.

Dr Pete uses his twenty years of psychology study and clinical practice (as well as multiple doses of his own Mid-Life Crises) to create Wellbeing & Life Strategy ‘shortcuts’ for you to implement so you can Successfully Ride the Waves of Mid-Life.

The professional side: a Masters in Clinical Psychology, PhD thesis in chronic stress and CBT, and subsequent work in mental health hospitals, welfare services and corporate and clinical private practice. Dr Pete has extensive experience in the treatment of many psychological problems.

The personal side: Dr Pete is a recovering “people pleaser”. Combined with the challenge of raising kids in a separated family and running a growing business, this has given him some deep bruises and scars. He’s had many opportunities to practice what he preaches. He knows the difference between textbook advice and practical wisdom.



Dr Pete is a wannabe soul surfer who is passionate about life and living. He spends as much time as possible surfing with his daughters and spending time with family and friends in the outdoors.

Dr Pete doesn’t have the luxury of spending all his time searching for the ultimate wave. However, he has learned to use surfing not only as a stress-relieving activity but also as a powerful metaphor for riding the waves of life and managing wipeouts.



INTRODUCTION: MAP OR SCALES?

WHAT WOULD YOU CHOOSE?

Scenario 1

You are dropped into a vast jungle with only the clothes you have on and a choice of either (1) a Map of the area OR (2) a set of Scales. What would you choose?

Scenario 2

You are frustrated with life and a mysterious wizard appears and offers you a choice of either (1) a Map showing you the next steps OR (2) a set of Scales to try to weigh and balance your life. What would you choose?

Answer

It is easy to see the correct answer is 'the Map' yet in real life decisions most people make about their lives they choose 'the Scales' ... Why?

There is a massive distraction out there called 'Work/Life Balance' stopping people from living deeply fulfilling lives. It's time to cut the crap! Seeking Work/Life balance to find happiness is a myth and a distraction from what really matters...

Life strategy is about being 'on purpose' with life - about leaving a positive legacy. About the courage to dream big and stretch yourself by setting amazing goals for your life and then developing and executing the plans which enable you to live your dreams. Life strategy is not about seeking some natural state of balance to find inner peace... but more about that in a moment.

After the first edition of *Life Strategy: Living The Endless Summer* came out I was inundated with questions about Work/Life Balance and how this relates to living your ideal life. Many people were seeking greater Work/Life Balance as a path to happiness however this is akin to '*putting the cart before the horse*' and creates an insidious and consuming diversion from the more important task of developing their Life Strategy.

When it comes to living your ideal life there is a lot of confusion out there between the angelic concept of Life Strategy and the devilish myths of Work/Life Balance. So it seemed vital in the introduction to this second edition to myth bust about two of the most insidious myths of Work/Life Balance so you can put this issue aside and refocus on the fun and excitement of Life Strategy.

MYTH 1. NATURE IS IN A STATE OF BALANCE AND SO WE SHOULD STRIVE TO DO THE SAME...

If I had a dollar for every TV commercial, magazine or billboard advertisement or health retreat brochure that told me Nature was in a state of balance and harmony and I would find the same balance and harmony if I bought their product, did their course or drank their potion I would be a very rich man! Don't get me wrong here, I am a 'nature boy' myself and a big fan of healthy living BUT the link about my own health being somehow related to the supposed balance and harmony of nature is just plain wrong! People who tell us to 'seek out a state of perfect balance' and point to 'mother nature' to justify their cause clearly do not really understand our deeper natural state.

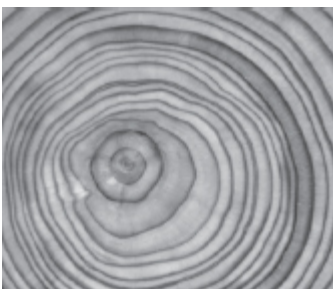
Let's face it, in the history of planet Earth there has never been a state of perfect balance in Nature but rather a constant state of flux. Weather patterns fluctuate through cycles of prolonged sunshine and droughts followed by storms and floods. Animal and human growth patterns fluctuate with a burst of rapid growth when young which slows as they age and battle diseases. The growth of plants and trees also fluctuate - thriving in sunlight, good soil and water and withering in shadow, drought and dust.



THE WISDOM OF TREES

Among animals and plants there is no state of perfect balance but rather a basic instinct to achieve stability (and longevity) amidst the internal and external challenges all living things must face. The commonalities among all surviving organisms are 1.) A clearly defined purpose and strategy for survival and growth; and 2.) The ability to adapt strategies to either (a) maximise growth in favourable conditions or (b) maintain basic survival during times of adversity.

For example, a tree has a clearly defined purpose which is to grow as tall and strong as possible and turn carbon dioxide into oxygen thus preserving the planet's atmosphere and sustaining its own habitat. A tree has strategies to adjust the shape and direction of leaves and branches towards sunlight and roots towards water - even moving around obstacles where necessary.



Despite such clear purpose and strategy there are still times of 'feast and famine' where the tree must either accelerate growth during favorable conditions or reduce growth and maintain survival during adverse conditions. The rings of growth on a tree are usually not in perfect symmetry. This highlights the tree's ability to adapt its own growth in cycle to match its environment which is out of balance and

constantly changing.

The tree shows us how the ingredients of clear purpose and strategy, combined with the ability to adapt to opportunity and adversity become the foundations to survive and thrive. Thus a clear purpose and strategy, combined with the ability to adapt to opportunity and adversity are the key for success – and these ingredients are the foundations of Life Strategy.

MYTH 2. BY SEEKING BALANCE WE WILL FIND INNER PEACE AND HAPPINESS

I was a fool. Like many people I have met over the years I spent the majority of my life seeking greater Work/Life Balance due to the mistaken belief that finding balance was at the core of living a happy and successful life. I made constant adjustments to my life to be the ‘super dad’ and ‘super husband’ at home and the ‘super boss’ at work whilst trying to be ‘super fit’ and being a ‘super friend’. At times I felt like I was on a treadmill that just kept getting faster accelerating at a speed I could no longer control. The constant re-balancing of my life to meet everyone’s needs became a nightmare - yet looking in from the outside I was living a ‘balanced’ life spending my time evenly across the many demands at home and work. But something was missing - something was wrong - I was not happy about my ‘balanced’ life - I felt lost and confused about the direction my life was taking...



THE SIREN SONG OF WORK/LIFE BALANCE

Looking back now I was seduced by a popular idea heavily promoted in the media and among wellbeing gurus. Just like sailors in the famous Greek myth ‘Odyssey’ by Homer, who became overwhelmed and distracted by the enchanting and bewitching song of the Sirens and ended up ship wrecked, I was so focused on finding greater balance I had lost sight of my bigger goals and dreams. Like those unfortunate sailors, who became distracted by the sirens, the distraction of seeking greater Work/Life Balance diverted me away from my Life Strategy - my true purpose and direction. I had fallen under the spell of the Work/Life Balance siren song and was too busy making all the ‘day-to-day’ balances and adjustments to notice I was drifting off-course and moving away from my deeper values and purpose and in danger of becoming ship-wrecked.

LIFE STRATEGY: ANSWERING A DEEPER QUESTION

When people ask me questions about achieving Work/Life Balance I now know they are, almost always, really seeking to answer a somewhat different question:

How can I feel more satisfied and fulfilled in my life despite my current circumstances?

The Wisdom of the Trees leads us to two very important questions:

Firstly, do you have a clear understanding of your life purpose and a vision for your life?

Secondly, do you have clear goals and action plans to live in alignment with your purpose and achieve your vision? And, can you recognise both the opportunities and setbacks you are currently facing and adjust your strategies to maximise personal growth?

LIFE STRATEGY: COMBINING PURPOSE WITH ACTION!

Life Strategy is about living your life with a clear sense of purpose and having a ‘map’ of goals and strategies that allow you to embrace opportunities and manage setbacks. People who invest their time and

energy to develop a Life Strategy have a clear sense of mission and purpose, dreams, goals and plans for each of the four quadrants of life (Play, Work, Relationship and Family & Friends) AND have the courage and self-discipline to live their dreams and make a difference.

Anyone who has a well developed Life Strategy does not seek 'Work/Life Balance' because they accept the fluctuating imbalances between work and life as part of achieving their bigger goals and fulfilling their purpose in life. Or, if they are out of balance too far they have the courage and self-discipline to make major changes to their work or life to rebalance and preserve their core purpose and thus get back on track with living their dreams (albeit revised according to circumstances).

Being truly happy and satisfied with your life is an objective well worth pursuing! Living a life with clear direction and purpose as well as exciting goals and action plans to manage opportunities and setbacks is achievable for anyone willing to escape the Myth of Balance and embrace the power and direction of Life Strategy!





PART ONE

GETTING READY



LIFE STRATEGY FAST FORWARD: THE SUNSET OVER TANAH LOT

The sunset was simply stunning – again! We sipped on cocktails from the balcony talking about incredible experiences of the recent past and dreaming of those yet to come! We were finally starting to live our Endless Summer Life Strategy!

We looked from the villa across the golf course to the waves rolling in over the reef and across to the Temple at Tanah Lot in Bali, Indonesia. It was my new “best ever” view on the planet – replacing the “best ever” view from inside the barrel of amazing tropical waves I had been surfing throughout the day! To be there, sharing that moment, deeply in love with my partner, I could see why the place we were staying at was called Nirvana.

It had been an amazing year of adventures and their accompanying challenges. From the summits of high altitude trekking on peaks near the Equator; to rock climbing on the sea cliffs in Thailand; to taking my kids on their first European journey and sharing with them the sheer beauty of Paris in winter and the hustle and bustle of London and Rome; to family reunions and beach holidays with close friends at wild coastal towns in Australia, surfing the rugged Pacific swells and diving into the depths of the ocean; to learning to run businesses remotely, and becoming an increasingly helpful mentor and coach to others on the same path; to getting married again barefoot on the sand amongst my closest family and friends before escaping to our island getaway...

But what was even more exciting than this was not learning the secrets to the Endless Summer Life Strategy, nor was it fulfilling some of my life dreams thus far BUT what was yet to come...

Venturus Est Optimus!



TO BEGIN YOU MUST FIRST DECIDE!

“We all dream, but not equally. Those who dream by night in the dusty recesses of their minds, wake in the day to find that it was vanity: but the dreamers of the day are dangerous, for they may act on their dreams with open eyes, to make them possible.” ~ TE Lawrence

I HAVE TRIED TO FINISH WRITING this book many times in the last 12 months! Yet something was missing...

Of all the important skills needed to Ride the Waves of Life, Life Strategy would be not only one of the most important but also the most fun! It has also been a lifelong companion of mine.

I am a big fan of Life Strategy. I have regularly written vision statements for my life imagining various successes – mimicking those I admired since my late teens – long before I properly understood the psychology and the framework of Life Strategy. More recently the Life Strategy framework was vital in guiding my way through the challenging times of mid-life (which I will share with you as a case study in this book) and provided the “map” needed to get my life back on track – living my dreams and making a difference!

So what has been the barrier to me finishing the writing of this book?

I now know that it was the realization that I needed to make clear that there is a step *before* the first step. No, not so much a step, but a getting ready, a getting into position to take the first step.

To get into a ready position, to take your first Life Strategy steps, you need to grasp the implications and power of Life Strategy and decide if

living your dreams is the right path for you. Once you have made this decision then the rest of this book will just flow...

Life Strategy is about turning dreams into reality and about living fully, passionately and fearlessly. Life Strategy can at times be very confronting – for two very different reasons.

Reason 1. First, the process of actually making plans to live out your dreams will force you to become fully responsible for your own life. You will need to accept, and find as you go that in fact you do accept, the size of the effort involved and the numerous false starts and failures you may encounter along the path to success. By the size of the effort I mean the intensity, duration, and number of areas of effort.

Dealing with failures and setbacks, not to mention the extreme effort at times to move from idea to action, and the regular and at times brutal trips outside your own comfort zone, are just too much for many people. They opt for a good life instead of a great life... or worse, become zealots against Life Strategy, entrenched in blaming others for their setbacks and inability to adapt and persevere.

Author Jim Collins sums up well this issue when he says that “*Good is the enemy of great.*”

Reason 2. The second confronting aspect of Life Strategy occurs, strangely enough, after the first few major goals have been achieved and dreams indeed have become reality. The actual experience of living your dreams must by necessity make the dream die so it can be born in reality. The reality of living your dreams will have unexpected blessings and curses. The blessings are the obvious joys and happy moments of experiencing what you had so long imagined. The curses are the hassles, unforeseen additional problems and the new challenges that such experiences bring you.

In psychology “the death of a dream” is a very important issue to consider when seemingly wealthy, famous or successful people suffer unexpected depression. The classic case study is about a deaf mother who is given an operation to be able to hear. Within weeks of being able to hear her children’s voices for the first time she becomes clinically depressed as her imagined sound was so much better than the subsequent reality. The death of a dream is also seen in mountaineering where it is widely known that reaching the summit is a bittersweet experience for many. The greatest chance of an accident is always on the way down rather than on the way up.

People who do not understand the core Life Strategy assumptions of personal responsibility and continuous learning and development invariably give up despite their initial success. They abandon the notion of a great life, retreating for the easier and less confronting option of merely a good life. They thus avoid both the joys and the challenges of future success.

SO WHAT TO DO? A DECISION MUST BE MADE...

Should I simply be content with an ordinary life and be happy in my disquieting frustration about unfulfilled dreams?

The advantages here are real. After all “nothing ventured, nothing lost”! I do not want to jeopardize my relationships with friends, family or colleagues with bright ideas or new opportunities. I want to be popular, one of the crowd, following whatever trends those close to me are following, always in the middle reinforcing the status quo, liked by the majority.

The disadvantages of an “ordinary life” are also very real. As the saying also goes: “nothing ventured, nothing gained”. I would never know how far I could go turning ideas into actions, never travel to amazing far away lands, never meet new people with fresh ideas and perspectives, never try new things that took me out of my comfort zone and the spectacular thrills, joy and new perspectives that these can bring.

FOR ME THE DECISION IS OBVIOUS!

My chosen path is a life open to dreaming dreams, with the courage and tenacity to turn them into reality and share them with friends and family of a similar mindset. To embrace Life Strategy and the continuous development and learning it brings is to live a great life.

“If a man does not keep pace with his companions, perhaps it is because he hears a different drummer. Let him step to the music which he hears, however measured or far away.” ~ Henry David Thoreau

So listen to the beat of your own drum and enjoy the following pages as you take the journey toward developing your own Life Strategy to Live Your Endless Summer!

So are you in? Are you up for it?

Hand on heart and say it:

- » I take responsibility for my own life.
- » I accept the size of the effort needed to turn my dreams into reality.
- » I accept that as I turn my dreams into reality the goal posts are going to shift as new challenges and opportunities arise.

IF YOU SAID “YES” TO LIFE STRATEGY...

...then may I welcome you to the beginning of your Life Strategy to Live the Endless Summer. In this book we're going to spend some time looking at how you can develop a Life Strategy to live your dreams and really make a difference.



The Endless Summer is a concept I have chosen to use for this book. *The Endless Summer* was a famous 1966 Surf movie in which two surfers followed the summer around the world in search of great waves and new cultures and experiences. Living the Endless Summer is the ultimate dream for many surfers, to be able to travel with family and friends following the summer season endlessly around the world searching for the perfect wave.

Not all of us are surfers so the Endless Summer can also represent other ideal lifestyles and goals that relate to living our dreams. The Endless Summer can mean a lot of different things to different people. Each of us have inside us some view about what that ideal world would be to live out our dreams and make a difference. And this book is going to help us lay the foundations of our Life Strategy so that we can live our version of the Endless Summer.

TAKE A MOMENT TO STOP AND THINK ABOUT YOUR DREAMS IN LIFE...

To live out your dreams you need a Life Strategy – so to develop your Life Strategy we will go on a journey together.

Firstly, in the rest of Part One we will explore the 4 Life Quadrants of Play, Work, Relationship, and Family & Friends, and do a stocktake on our current position in each of these quadrants.

Then in Part Two we will move systematically through the 4 Steps of developing a Life Strategy.

Step 1 – Legacy involves looking at the end of our lives so that we can understand the principles that we want to adhere to so we can look back and say we not only lived our dreams but we made a difference.

Step 2 – Life Dreams is about stretching out our imaginations and thinking about what that ideal world would be.

Step 3 – Setting Goals is about starting to concretize and be very specific about the goals we set for ourselves, so we can live our dreams and leave our Legacy.

Step 4 – Action Planning is about all the little details. There may be thousands of little things to think about and consider so that you can successfully live your dreams, achieve your goals, and leave your Legacy. We will also develop Setback Plans to take advantage of any opportunities, manage adversity, and enlist support networks. We'll take some time to really think about the people you need on your team so that you can live your dreams and have a great Life Strategy.

By completing all of the activities in this book you'll have your Life Strategy map ready to go, and you can take the next steps towards living your own version of the Endless Summer.

In Part Three, we will look at how to stay motivated and celebrate your successes.

CASE STUDIES... YOU AND ME!

In writing this book I had assembled a series of case studies from people who had completed the workshops I had run and were happy to share their stories – albeit with various details removed to respect their privacy. However the more I tried to organize and shape their stories the more concerned I became about missing the highly individual details that drove them to create their unique Life Strategy plans.

The detailed elements involved in a person's Life Strategy are so intricate and personal that it must be understood in the context of their life history. Given that I cannot share their life histories to give you the context to their Life Strategy plans, I have chosen to provide various examples of their plans where relevant and instead focus on two case studies where further context and history *is* available – namely you and me!

ABOUT ME



I am a 39-year-old Clinical Psychologist working in private practice. I am divorced and share the care of my two daughters aged 8 and 12 years.

HISTORY

I'm the younger of two children. My childhood had its ups and downs. We moved around a lot due to my father's work. I was bullied a bit at school but was also quite athletic. I quickly excelled at sports and often chose individual pursuits such as running and cycling. I had very limited income growing up and was always doing odd jobs or paper runs to earn pocket money.

In my teens, I was one of the pimply kids and more of an "outsider" to the main social groups, but my love of exercise and the outdoors saw me bushwalking, rock climbing, snorkeling, scuba diving and surfing (in between schoolwork and part-time jobs to pay for my hobbies). I had a small group of "outsider" friends at school who I would regularly hang out with – others who had an eclectic mix of interests.

At the end of high school I faced several challenging Waves of Life all within a space of a few months. Firstly a Big Wave hit, when my first girlfriend broke up with me. A Tsunami hit, when I seriously injured both my shoulders – that was the end of rock climbing for me. Another Big Wave hit when I didn't get into the University course I wanted.

I took a year off and worked and travelled. I began working as a personal carer for people with disabilities. From there I started studies in disability and rehabilitation, which led to my major in Psychology and subsequent Honors degree, Masters and PhD.

I got married in my early 20s after dating my girlfriend for a couple of years. We moved interstate to pursue my postgraduate studies and then settled happily in a capital city. We had two children while I worked full-time, initially in public health and then as the founder of a large private practice and corporate consulting group. I was a passionate father and despite working long hours during the weeks to provide for my family I would spend the weekends playing with the kids and taking them away on many outdoor adventures.

A few years ago, my marriage ended after many years together. This was a Tsunami – a massive Wave of Life for me – but not so uncommon for many people these days. In hindsight I can now see how my former wife and I grew apart over the years. On looking back, perhaps there was too much focus on the children and work, and not enough focus on ourselves as a couple.

The last few years have been about managing the separation and raising our kids in a shared care arrangement, which has had its challenges. This time has also been about reconnecting with my core values and translating these values into a positive Legacy statement, casting new life dreams, setting goals and action planning to get my Life Strategy working again.

ABOUT YOU?

Stop and take a moment to think about your life history and the successes and challenges you have had. Think about your childhood – what were the highlights and low points? What were your interests and hobbies? What career ambitions did you aspire to as you looked forward to growing up? Who were the people you admired and why?

What about the teenage years? What was your major focus at school – what subjects were you good at and what did you struggle with? What about friends – who were your closest friends and what were the best and worst characteristics they had? What about hobbies – what did you enjoy doing the most in your teenage years and why? What about early relationships – what were the things you learned about yourself during this time?

As an adult – up until right now reading this book – what have been the highs and lows of your life thus far? The greatest challenges and achievements? What are the unfulfilled ambitions that drive you forwards in life? What do you hope to achieve in the next few years of your life at work, with family, with friends and in your lifestyle and recreation?

By taking a moment to reflect on your own life history and the defining life events that have shaped you to become who you are today, you will have the insight and awareness to more effectively progress your Life Strategy.



THE STOCKTAKE

“Life is either a great adventure or it is nothing.” ~ Helen Keller

In this chapter we will do a stocktake of your life as it currently stands, looking at both the depth and the balance of your life across the 4 Life Quadrants. We will assess any gaps or areas of “over-focus” in order to establish a starting point for our Life Strategy journey.

DARE TO DREAM – YOUR IDEAL WORLD

I want you to stop for a moment, stretch out your arms, stretch out your mind and consider: What does your ideal world look like?



In your ideal world:

- » Where do you live?
- » Who lives with you?
- » What do you do for fun?
- » How do you earn money?
- » How do you contribute to a better world?
- » Who are your closest family and friends?

Take a moment to get in touch with the images, ideas and thoughts that are running through your head when you start to consider your ideal world. Jot down below at least one thought that responds to each of the six “in your ideal world” questions above, and one or two other images or ideas that come to mind.

- » I live _____
- » _____ lives with me
- » For fun I _____
- » I earn money by _____
- » I contribute to a better world by _____
- » My closest family and friends are _____
- » Other images/ideas _____

THE STOCKTAKE: YOUR LIFE & THE 4 LIFE QUADRANTS

Four major quadrants or areas of our lives are Play, Work, Relationship, and Family & Friends. Why four areas? Why these four?

The four areas of Play, Work, Relationship, and Family & Friends provide a simple and comprehensive framework to help us think about our lives in a more holistic or complete way. These four areas overlap. There may be areas beyond these four quadrants for some people, such as spirituality and faith. For some other

people spirituality and faith might inform each of the 4 Life Quadrants. Also, for example, for some people such as those who have chosen a single life, the category of Relationship might not necessarily include having or desiring to have a “life partner”.

Allowing for these caveats, the 4 Life Quadrants is a simple and effective model that can help us to understand the depth and balance of our lives at the present moment. It is a model I have found to be useful personally, and so have many other people that I’ve worked with.

In this section I want you to spend some time getting to know the things you like to do in each of the 4 Life Quadrants and the extent to which you’re currently able to do these preferred activities. By doing a stocktake of how you currently see yourself across the 4 Life Quadrants you will be



able to see where you may be in or out of balance with your life – gaps where there is not enough focus and areas of “over-focus” where you spend too much time. This stocktake is how you get into position to build your Life Strategy to live The Endless Summer.

PLAY

Let’s stop for a moment and think about the Life Quadrant of Play. What sort of activities do you like to do to Play?

For adults, Play can include a wide variety of activities such as: sporting events, travel, going to the movies, restaurants, cafes, galleries, theatre, museums, playing with kids, water sports, ball sports, team sports, cycling, reading, cooking, walking, bird watching, fishing, listening to music, dinner parties... the list can go on and on. When you think about Play what images, ideas and thoughts do you have about the sort of Play activities you like to do?

PLAY STOCKTAKE – WHERE ARE YOU AT NOW?

In order to understand the starting point for your Life Strategy in the area of Play, stop and assess what activities you like to do as well as your current status. Ask yourself (1) *how often* do you get to engage in Play at the current time, and (2) to what extent do you enjoy your Play activities. The following exercise is designed to help you to list the things you like to do when it comes to Play. It is a brutally honest assessment about how much and the quality of Play you have going on in your life right now. I will do it with you. Write down in the following table what you are currently doing in the area of Play:

PLAY – THE THINGS I LIKE TO DO:	PLAY – THE THINGS I LIKE TO DO:
Dr Pete... <ul style="list-style-type: none">• <i>Surfing & water sports (of course!)</i>• <i>Trekking & mountaineering</i>	Me...

<ul style="list-style-type: none"> • <i>Running & triathlon</i> • <i>Reading non-fiction</i> • <i>Listening to music</i> • <i>Meditation</i> • <i>Playing games & travel with my children</i> • <i>Movies & restaurants</i> 	
CURRENT STATUS	CURRENT STATUS
I get to do these things: Too Much 5--4--3-- <input type="text" value="2"/> --1 Not Enough	I get to do these things: Too Much 5--4--3--2--1 Not Enough

As you can see, I have a reasonably broad list of activities I like to do in the area of Play – so no major gaps in this area. When it comes to my current status I am closer to Not Enough than Too Much so there is some room for improvement here in terms of quantity. On the other hand, I really enjoy what I do, though I have a few things in mind that would add to that enjoyment. Overall, room to improve.

PLAY STOCKTAKE – HOW DID YOU GO?

If you have a lot of activities listed – well done! You have a good depth of activity in the area of Play, a great basis for building your Life Strategy in this Life Quadrant. If you do not have many activities listed in Play, there may be possible gaps that we can come back to during this book when we build a Life Strategy that brings more depth and balance to the area of Play in your life.

If you enjoy what you do in Play – well done! You have identified Play activities that work well for you and fit with who you are. If you do not enjoy your Play activities then there may be some steps you can take, whether to improve your enjoyment in your current Play activities, or to consider other possible Play activities.

WORK

Now let's turn our attention to doing a stocktake on the Life Quadrant of Work.

Have a think about the key activities you do at Work. Be specific and break down the various types of things you do at Work into individual activities. Remember, you may like some more than others! Try to come up with 5–10 main Work activities *that you currently do*.

Work is a broad topic and can include a wide variety of activities such as operating machinery, going to meetings, answering emails and phone calls, developing and designing products, making things, fixing things, driving vehicles, selling products, interacting with customers and clients, organizing and storing equipment, public speaking, managing accounts, providing care... the list goes on.

When you think about Work what are the sort of Work activities you like to do?

WORK STOCKTAKE – WHERE ARE YOU AT NOW?

Similar to the exercise in Play, to understand the starting point for our Life Strategy in the area of Work it is important to stop and assess what activities we like to do as well as our current status – that is, how often we get to engage in the Work activities we like to do.

In this next exercise keep in mind that there are two quite different reasons why you might *now* be doing more, or less, of the Work activities you *like to do*:

1. You are working as much as you want or not – e.g., you would like to work more, or less, or about the same.
2. Your present work comprises, or at least includes, Work activities that you *like to do*.

List in the following table the things you *like to do* when it comes to Work and conduct an honest assessment about how much Work you are currently doing that you *like to do*. I will do it with you:

WORK – THE THINGS I

WORK – THE THINGS I

LIKE TO DO:	LIKE TO DO:
Dr Pete... <ul style="list-style-type: none"> • <i>Interacting with clients</i> • <i>Public speaking</i> • <i>Writing books and articles</i> • <i>Producing videos & training programs</i> • <i>Website development</i> • <i>Delivering training & workshops</i> • <i>Providing mentoring & coaching</i> 	Me...
CURRENT STATUS	CURRENT STATUS
I get to do these things: Too Much 5--4--3--2--1 Not Enough	I get to do these things: Too Much 5--4--3--2--1 Not Enough

As you can see in the table, I have a reasonably broad list of activities I like to do in the area of Work which I am currently doing – so no major gaps in this area. When it comes to my current status I am closer to Too Much than Not Enough so there may be some room for me to improve in terms of reducing the risk of excessive focus on Work.

WORK STOCKTAKE – HOW DID YOU GO?

Just like the review of Play, let’s review your results on Work. If you have a lot of activities listed *that you like to do and that in fact you currently are doing* – well done! You have a good depth of activity, a great basis for building your Life Strategy in this Life Quadrant. If you do not have many activities that you *like to do* listed in Work, then there may be possible Work gaps that we can come back to during this book when we build your Life Strategy. Keep in mind that there are two possible aspects – *amount* of work, and *type* of work activities.

RELATIONSHIP

The next Life Quadrant we want to stocktake is Relationship. I want you think about your primary relationship. If you're currently single and not in a relationship I want you to think about a relationship you've had previously or about what your ideal relationship will be one day. Have a think about what you like to "do" in your relationship. For me, I think of spending quality time together, intimacy, sharing meals, going out to movies, dinners or cafes, walking or exercising together, travel and holidays, lots of communication, and being a parent.

Now it's your turn: What are the things you like to "do" in your relationships – past, present or ideal, as your case may be?

RELATIONSHIP STOCKTAKE—WHERE ARE YOU AT NOW?

Just like the sections above on Play and Work, to understand the starting point for our Life Strategy in the area of Relationship now is the time to stop and assess what activities you like to do as well as your current status. That is, how often do you get to engage in the Relationship activities you currently like to do. List the things you like to do when it comes to Relationship and conduct an honest assessment about how much you get to do these activities right now. I will do it with you:

RELATIONSHIP – THE THINGS I LIKE TO DO:	RELATIONSHIP – THE THINGS I LIKE TO DO:
Dr Pete... <ul style="list-style-type: none">• <i>Spending quality time</i>• <i>Intimacy</i>• <i>Sharing meals</i>• <i>Going out to movies, dinners or cafes</i>• <i>Walking or exercising together</i>• <i>Travel and holidays</i>• <i>Communication</i>	Me...

• <i>Sharing the challenges of parenting</i>	
CURRENT STATUS	CURRENT STATUS
I get to do these things: Too Much 5--4--3--2--1 Not Enough	I get to do these things: Too Much 5--4--3--2--1 Not Enough

As you can see, I have a reasonable *number* of activities and a reasonable *range* of activities I like to do in the area of Relationship – so again no major gaps in this area. When it comes to my current status I am currently in the Not Enough category so doing something about this area will be a high priority for me in my Life Strategy. In fact I am already doing some things about this – more on this later.

RELATIONSHIP STOCKTAKE – HOW DID YOU GO?

Just like the reviews of Play and Work, let’s review your results in the Relationship quadrant. If you have a reasonable *number* and *range* (or *types*) of activities listed – well done! You have a good depth of activity, a great basis for building your Life Strategy in the area of Relationship. If you do not have *many* activities listed, or if they really are all the same sort of activities – then there may be possible gaps that we can come back to when you build your Life Strategy.

FAMILY & FRIENDS

The last stocktake of the 4 Life Quadrants is in the area of Family & Friends. Think about what sort of activities you like to do with your Family & Friends. Many of my preferred activities are around sharing meals and being together such as at dinner parties at home, going to restaurants, or picnics in the park or at the beach. I also like to play sports and exercise with particular friends, travel and visit local camping areas in coastal areas or in the mountains. I also like to get together with other families with

similar-aged children so they can play together. Then I can join in the activities with the kids, or spend time in conversation with their parents.

I am aware that I am somewhat limited in my Family & Friends focus and know of other people who have much broader interests and activities they engage in with Family & Friends, including other activities beyond my list such as local community groups, attending events such as sports matches or theatre productions, craft and hobby groups etc.

Now it's your turn: What are the things you like to do with your Family & Friends?

FAMILY & FRIENDS STOCKTAKE – WHERE ARE YOU AT NOW?

Just like the previous sections now is the time to stop and assess what activities you like to do with Family & Friends as well as your current status. That is, how often you currently get to engage in these activities you like to do. List the things you like to do when it comes to Family & Friends as well as conduct an honest assessment about how much you currently get to do these activities. I will do it with you:

FAMILY & FRIENDS – THE THINGS I LIKE TO DO:	FAMILY & FRIENDS – THE THINGS I LIKE TO DO:
<p>Dr Pete...</p> <ul style="list-style-type: none"> • <i>Sharing meals together – dinner parties, restaurants, or picnics</i> • <i>Play sports and exercise</i> • <i>Travel and camping in coastal areas or in the mountains</i> • <i>Get together with other families with similar-aged children</i> 	<p>Me...</p>
CURRENT STATUS	CURRENT STATUS
<p>I get to do these things: Too Much 5--4--3--2--1 Not</p>	<p>I get to do these things: Too Much 5--4--3--2--1 Not</p>

Enough

Enough

As you can see, I have only a limited list of activities I like to do in the area of Family & Friends with some gaps in this area. When it comes to my current status I am currently in the Not Enough category, so this area will be a high priority for me in my Life Strategy.

FAMILY & FRIENDS STOCKTAKE – HOW DID YOU GO?

Just like the reviews of the other three Quadrants, let's review your results in the quadrant of Family & Friends. If you have a lot of activities listed, with some variation in the types of activities – well done! You have a good depth of activity – a great basis for building your Life Strategy in this area. If you do not have many activities listed and if there is not much variation among them, then there may be possible gaps that we can come back to when you build your Life Strategy.

THE 4 LIFE QUADRANTS – STOCKTAKE REVIEW

Now that you have completed a quick stocktake of your life as it currently stands across the 4 Life Quadrants of Play, Work, Relationship, and Family & Friends take a moment to refresh your memory of any gaps within each Quadrant. These are the areas of your life that may need a wider mix and/or greater depth of activities. Also consider your “current status” ratings where you have either too much or too little going on in your life right now. We will come back to these issues later in the book.

DR PETE'S QUICK TIPS: EXPANDING THE HORIZONS OF YOUR LIFE QUADRANTS...

You know, one of the most common problems I encounter in working with clients trying to get a better work/life balance is discovering they do not have a diverse enough mix of activities in various Life Quadrants. Whilst this is easy for most of us to understand, when trying to increase the mix of activities within a Life Quadrant (for example Play), we often find it a very frustrating task. We have to try new activities and meet new people – and don't always enjoy every new activity we try or every new person we meet. Unless we have the self-discipline and perseverance to keep trying we give up too soon and miss out on the benefits of new activities and new friends. My quick tips are:

1. *Remember it's a numbers game – the 1 in 10 rule.* Try at least 10 new activities before you give up, and try to mix with at least 10 new people.
2. *Fake it till you make it!* Sometimes you need to give things a go a couple of times before you start to enjoy them (but only a couple of times – don't keep trying if it still doesn't work).



THE LIFE STRATEGY FRAMEWORK

*“Efforts and courage are not enough without purpose and direction.” ~
John F. Kennedy*

Using your understanding of your life as it currently stands that was established in the last chapter, we will now introduce the 4 Steps to Developing a Life Strategy. This will help you develop a detailed action plan to achieve your goals, live your dreams and leave a positive Legacy.

Having completed the Stocktake and established our current status across the 4 Life Quadrants we are now ready to get into the Life Strategy Framework. We can start the journey to being more on purpose with our life, being clear on what really matters in the end, and having clear dreams and specific goals as well as immediate action plans to make it happen.

We also need support networks and plans to manage any setbacks along the way. As you can see in this diagram, there are 4 Steps to establishing your own Life Strategy.

The first step is the foundation step of understanding your Personal Legacy. From there you build up towards detailing your Vision and Dreams for your life. Then we move to Setting Goals, and finally Action Planning the detailed actions we need to take to make it happen.



STEP 1 – YOUR LEGACY: WHAT IS IT?

Your legacy is about how the results of your life reflect your mission in life. What will be your personal legacy and what is your personal mission in life? Your legacy and mission in life are more likely to be achieved if they are clear and focused.



For the Endless Summer surfer this may be about nature, travel, and sharing new experiences with friends and family. The Life Quadrant of Play may be all about the surf and the ocean. Work might be more about being responsible than being about a specific type of career such as a career linked to the ocean and environment. Relationship might be about living with a partner who shares similar goals in travel and nature. Family & Friends might be about travelling with family and friends wherever possible as well as being available and supportive even when travelling.

In the next chapter we will examine: What is your mission in life? What Legacy do you want to leave behind in the areas of Work, Play, Relationship, and Family & Friends?

STEP 2 – LIFE DREAMS: YOUR IDEAL WORLD

Dreams are the visions and ideals for our lives.

For the Endless Summer surfer, dreams may be the perfect waves in the perfect locations with the perfect group of family or friends. Play may be focused on fantastic surfing experiences, Work may be focused on flexible hours and a role that keeps connection with the ocean. Relationship may be about sharing a love of surfing with their partner. Family & Friends may be about spending lots of time enjoying the ocean with like-minded family and friends.

In the next chapter we will examine what your dreams in life are across the areas of Work, Play, Relationship and Family & Friends.

STEP 3 – HOW TO SET GOALS AND OBJECTIVES

Setting specific goals and objectives provides the basis for establishing action steps to turn our dreams into reality.

For the Endless Summer surfer a goal might be to visit the top ten surfing locations around the world. The objective might be to visit the specific countries and surf at the specific beaches that will achieve that goal. Then in the area of Play there might be a list of locations and surfing beaches to experience with specific Family & Friends. There will also likely be specific income goals and flexible hours needed for Work and specific characteristics needed in a partner, and aspects of a partnership to negotiate or clarify, for a Relationship to work effectively.

In subsequent chapters we will examine: What goals do you need to set for yourself to be able to live your dreams? What are the specific goals and objectives you need to identify in each of the areas of Work, Play, Relationship, and Family & Friends?

STEP 4 – ACTION PLANS: – STRATEGIES AND STEPS TO ACHIEVE YOUR GOALS

Any major goal that you want to achieve in life will require setting more specific objectives and then detailed steps to make it happen. Great action plans also address support networks and setbacks.

For the Endless Summer surfer a number of detailed steps might be needed: to raise the money and organize flexible arrangements for Work; to learn new languages, organize complex travel plans and health checks, and ensure physical fitness to be able to follow the summer season for Play; to ensure having phones and/or internet to stay in touch with Family & Friends; and to communicate clear expectations and design travel plans to be supportive of a Relationship. Support networks for the Endless Summer surfer can include: Mentors to help stay focused on goals; Friends who can help with specific issues such as surfing skills or local culture and customs; and Professionals who can help to manage finances, travel plans and health. Setbacks for the Endless Summer surfer might include delays and cancellations in travel plans, poor weather and waves, ill health, running out of money, or other unforeseen circumstances.

In Step 4 we will cover: What detailed action steps do you need to plan to achieve your life goals? What specific action steps are needed across the 4 Life Quadrants of Work, Play, Relationship and Family & Friends? What

support do you need to have in place to live your dreams, and what setbacks do you need to plan for? What backup plans do you need to have in place, and who are the key mentors who can support you across the different areas of Work, Play, Relationship, and Family & Friends?

THE ENDLESS SUMMER LIFE STRATEGY – 1 PAGE PLAN

Appendix 1 includes a blank Endless Summer Life Strategy Plan that you can fill in as you go, as well as a sample filled in by me (smaller versions on the following pages).

Your Life Strategy will ensure that each of your 4 Life Quadrants are taken into account. Put the other way round, you can avoid the common mistake of having strategies that are incompatible between the different quadrants of your life, for example, having Work goals that are not compatible with Relationship goals. The process to establish your Life Strategy needs to include checking that the goals and steps in your Life Strategy are not incompatible with each other, for example, having goals that do not help you fulfill your Legacy.

As we prepare to begin Step 1 – Legacy, I want to leave you with some food for thought. The first is a quote from Timothy Ferriss, who wrote *The 4-Hour Workweek*:

“The timing is never right, the conditions are never perfect, and some day is a disease that will take your dreams to the grave with you.”

The second quote is from Kaspri Apel who said:

“There is never a right time – there is only time.”



PART 1. THE BIG PICTURE		
AREA & LEGACY	LIFE DREAMS	GOALS (S=STRETCH)
1. Play <i>He loved the outdoors and went on many great adventures.</i>	<i>To travel the world, climb mountains and surf the oceans with family and friends.</i>	<i>Several weeks in Europe with family. (S)</i> <i>Climb Mts Kilimanjaro, Kinabalu and Kosciusko in one year. (S)</i> <i>Complete Half Iron Man Triathlon. (S)</i> <i>Weekend surf trips with family.</i>
2. Work <i>He was inspiring and challenged people to be their best.</i>	<i>To be a part of an enduring company that helps others.</i>	<i>Join a company with aligned values.</i> <i>Help build and grow the business.</i> <i>Become a partner or owner. (S)</i>
3. Relationship <i>He loved his partner completely and passionately.</i>	<i>Be in a wonderful loving relationship for the rest of my life.</i>	<i>Learn from past and profile my strengths and weaknesses.</i> <i>Begin dating again.</i> <i>Practice good boundaries and communication.</i>
4. Friends & Family <i>He was generous, supportive and available.</i>	<i>Be a super cool dad to my children and have great adventure buddies and close family ties.</i>	<i>Go camping with my family during school vacations.</i> <i>Build a network of 5-7 close friends with outdoor interests.</i> <i>Weekly dinners with extended family.</i>

PART 2. MAKING IT HAPPEN!						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play	<i>Climb the 'K' Mountains across the World (S)</i>	<ul style="list-style-type: none"> • Fitness – start weekly training program. • Research – best seasons to go and local guides. • Recruit – friends to come along and share the experience. 	<ul style="list-style-type: none"> • Money – Total budget \$30K. • Time – Book leave from work. • Check travel, visa and health insurances. 	<ul style="list-style-type: none"> • 12 months: Kosciusko in Feb; Kilimanjaro in May; Kinabalu in Oct. • Due dates for visas, injections. 	<ul style="list-style-type: none"> • Friends to train and go on adventures. • Professional Guides for mountains. • Travel agent for booking & permit. • Mentors who know training and preparation 	<ul style="list-style-type: none"> • Have travel insurance. • Medications for altitude sickness / acclimatize. • Injuries – Avoid high risk sports prior. • Money – have spare available if needed.
2. Work	<i>Become a Partner in the Company (S)</i>	<ul style="list-style-type: none"> • Attend 95% of network meetings. • Bring in 2 new jobs each month. • Complete KPIs determined by Line Mgt • Get promoted to Senior Associate. 	<ul style="list-style-type: none"> • Manage Time. • Manage Diary. • Industry updates. • Referrer details. • KPI work plan. 	<ul style="list-style-type: none"> • Assess progress monthly. • Complete KPIs within 6 months. • Next promotion in 12 months. 	<ul style="list-style-type: none"> • Talk to friends about how to succeed at work. • Use mentors in the company to grow business. • Professional coach to refine skills and business acumen. 	<ul style="list-style-type: none"> • Delays in promotion – manage any setbacks by debriefing with mentors and professional coach. • Setbacks in growing business – use supports as per the above.
3. Relationship	<i>Begin dating again</i>	<ul style="list-style-type: none"> • Seek advice from 5 friends on dating. • Sign up to a dating website. • Go on 3 coffee dates. 	<ul style="list-style-type: none"> • Time. • Internet. • \$50 for dates. 	<ul style="list-style-type: none"> • 2 weeks (advice). • 1 week (dating website). • 1 month (3 coffee dates) 	<ul style="list-style-type: none"> • Talk to friends about their experiences to help meet the right people. • Life coach to review strengths and weaknesses and give feedback. 	<ul style="list-style-type: none"> • Not meeting the right people – keep persevering and seek support from friends and adjust strategy and approach with life coach.
4. Family & Friends	<i>Go camping with my family during school vacations</i>	<ul style="list-style-type: none"> • Talk to friends and organize a date for camping in the school holidays. • Pre-book date. • Book camping site. 	<ul style="list-style-type: none"> • Time. • Diary. • Camping equipment. • \$200 for weekend. 	<ul style="list-style-type: none"> • 1 week (talk to friends). • 1 week (pre-book dates). • 2 weeks (book camping site). • 1 month before trip (check camping equipment). 	<ul style="list-style-type: none"> • Friends to go camping with (organize for several families) to join the trip.. 	<ul style="list-style-type: none"> • Scheduling doesn't work and friends can't make it – organize several families. • Wet weather weekend – have wet weather gear, back-up date later in the year in case of cancellation.



THE ENDLESS SUMMER LIFE STRATEGY PLAN



PART 1. THE BIG PICTURE		
AREA & LEGACY	LIFE DREAMS	GOALS (S=STRETCH)
1. Play		
2. Work		
3. Relationship		
4. Friends & Family		

PART 2. MAKING IT HAPPEN!						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play						
2. Work						
3. Relationship						
4. Family & Friends						



PART TWO:

DEVELOPING YOUR LIFE STRATEGY



STEP 1 – YOUR LEGACY: THE FINISHING LINE COMES FIRST

“The unexamined life is not worth living.” ~ Socrates

“You must know for which harbor you are headed if you are to catch the right wind to take you there.” ~ Seneca

To live a truly fulfilling life remember that “The Finishing Line Comes First”. Whatever you do in life, by considering your Legacy first, you will make decisions consistent with that Legacy.

In this chapter we will reflect on our Personal Legacy, that is, what we are remembered for, what we leave behind – the good the bad and the otherwise – when we are no longer here on this earth.

In order to live the Endless Summer and really make a difference in life, begin by considering the end – the end of your time. Will you be able to look back and say: “Not only did I achieve great goals and live out my dreams but, more than this, in doing so I left a positive Legacy”? So we are going to take a look at what that means for you and how you can take some time now to lock in what sort of Legacy you would like to leave. This is the first step in building your Life Strategy plan.

In this chapter we will specifically ask: What is your mission in life? What Legacy do you want to leave behind you in the areas of Work, Play, Relationship and Family & Friends?

A well-known truism in psychology and philosophy is that in order to achieve your goals in life you need to be clear on what those goals are – to set your goals. The foundation of your life goals is your Personal Legacy –

what remains when you are no longer around to take care of it. Some people never set such goals, at least not in a direct way, and perhaps never make clear, even to themselves, the basis of the dreams and visions they follow.

My invitation to you is to make clear to yourself your Personal Legacy as the basis of your dreams and visions, that in turn lead to goals and plans and the specific actions you will take.

Like an iceberg that is 90% under water, your actions and plans – the more visible part – build on your goals, which in turn have built on your Life Dreams, and your Personal Legacy. Or like a building where you don't see the survey work, the site studies and the foundations, only the finished building, but where the unseen part needs to be well-constructed for the building to survive and achieve its purpose.

When it comes to Personal Legacy and Life Strategy, history has many examples of fools and their folly, as well as examples of the wise and wonderful. Consider famous and infamous people who make grand promises to make a difference only to fail to deliver on their promises, and who leave a trail of misery, financial ruin, and angry, disillusioned people in their wake. On the other hand, likely you will know, or know about, people who persevere towards making a difference, perhaps at times via unseen acts of courage, generosity and kindness.

In ancient religious, philosophical and military strategy texts there are many parables about people building towers which fall because of a lack of understanding of structure, or storing up wealth and missing out on life only to die before they get to enjoy their gains, or setting out to conquer another country allegedly for the benefit of all, only to fail and destroy many lives in the process. Had these people had a clearer sense of the Legacy they were trying to achieve they may have been better able to adjust their plans along the way, avoid the scale of disaster that occurred, and maybe even achieve something of value along the way.

So before getting too serious about our dreams in life, and goal setting and action planning, remember that to live a truly fulfilling life “The Finishing Line Comes First” as we take the time now to examine our Personal Legacy and mission in life. Let's look at how to apply our Personal Legacy to the 4 Life Quadrants of Play, Work, Relationship, and Family & Friends. We will complete an exercise to turn your Personal Legacy into a simple and effective mission statement to guide you on the journey of Life Strategy.

LEGACY FOR THE ENDLESS SUMMER SURFER

Let's first hear from the Endless Summer surfer whose Legacy might be about nature, travel, and sharing new experiences with friends and family. The Endless Summer surfer's 4 Life Quadrants might be about:



- » Play: All about the surf and the ocean.
- » Work: More about being responsible than having a particular career ambition or a career linked to the ocean and environment.
- » Relationship: Maybe living with a partner who shares similar goals in travel and nature.
- » Family & Friends: About travelling with family and friends wherever possible, and being available and supportive when away without them.

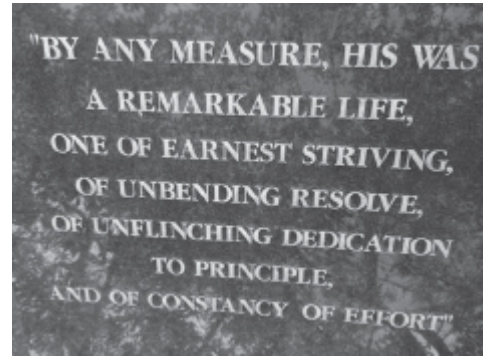
YOUR PERSONAL LEGACY AND MISSION IN LIFE

Having a personal mission for your life is a great way to establish the key guiding principles for how you want to live. A great way to develop a mission is to first consider your Legacy. What would you like those important to you to remember about you? A Legacy is something that is handed down from one generation to another and can be positive or negative. Your Personal Legacy is the imprint of your personality and behavior, and the result of your actions, that you leave behind. We all leave some sort of Legacy. The question is whether we will make it a positive Legacy or a negative Legacy, or whether we simply leave it to chance. I want to encourage you to be proactive and take some time to consider what you would like your Personal Legacy to be to the people important to you.

LEGACY: THE TOMBSTONE

Have you ever visited a cemetery? Walked along the rows of tombstones and read the inscriptions about the people who have been buried there? On those tombstones the inscriptions often include Legacy statements – things that are said to reflect the person's character or contribution to life.

Cemeteries are somber places and some prefer not to visit – perhaps none of us wants to be reminded of our own eventual death. Yet sometimes by remembering that we all die at some point we would be better equipped to live each day of our lives as if it was the last, and make the most of all the opportunities and relationships we have.



Take a look at the picture above. It's a tombstone in a cemetery near where I live. Have a look at the inscription – the Personal Legacy that this person was remembered for:

“By any measure, his was a remarkable life, one of earnest striving, of unbending resolve, of unflinching dedication to principle and of constancy of effort.”

Let's reflect on this further. This person appears to have made a substantial impact in life in the face of difficulties, and to have left a powerful positive Legacy in the eyes of others.

Some people can be uncomfortable about thinking about their own death, so keep in mind that the purpose of this chapter is not *really* to plan your tombstone or eulogy, but to use exercises that make use of those ideas to help you build your Life Strategy. And sometimes death can be spoken of more lightly, as comedians often remind us. On the lighter side, trucking magnate Lindsay Fox, whose trucks bear the slogan, “You are passing another Fox”, was asked what he wanted on his epitaph. His reply: “Another Fox has passed.”

Also, keep in mind that some tombstone Legacy statements might reflect family views, or wider politics, rather than what a more independent close understanding of a person's life might suggest as a more accurate summation. Nevertheless, and for what it is worth, here are some famous Legacy statements on tombstones to consider...

- » Marty Feldman: *He made us laugh, he took my pain away. I love you, Lauretta.*
- » Peter Finch: *Distinguished actor, loving husband and father. Always in our hearts.*

- » Alexander Hamilton: *In testimony of their Respect For The Patriot of incorruptible Integrity, The Soldier of approved Valour, The Statesman of consummate Wisdom; Whose Talents and Virtues will be admired By Grateful Posterity Long after this Marble shall have moldered into Dust.*
- » Hank Williams: *Thank you for all the love you gave me. There could be no one stronger. Thank you for the many beautiful songs. They will live long and longer.*



Take a moment now to think and reflect about what it is you would like your Legacy to be through what is left behind on your tombstone. You might like to jot some thoughts in the graphic at right, or use a separate sheet of paper.

LEGACY: THE EULOGY

Another window into understanding the power of Legacy can be from the words spoken at funerals about the dearly departed. These speeches are called eulogies. A eulogy is “a speech or piece of writing that praises someone or something highly as a tribute to someone who has just died”. Eulogies given at funerals are typically speeches that, aside from background detail about the person, mainly focus on the qualities that the person possessed and illustrated with stories about the events of their lives. For example, if the person is remembered for being kind, then a story about the time they helped a homeless man get back on his feet might be told, or if they were funny then examples of pranks or jokes might be mentioned.

Two famous Eulogy excerpts highlight this point. The first is from Nelson Mandela’s funeral:

We wish today, to express two simple words. Thank you. Thank you for being everything we wanted and needed in a leader during a difficult period in our lives. Whilst your long walk to freedom has ended in the physical sense, our own journey continues. We have to continue building the type of society you worked tirelessly to construct. We have to take your legacy forward. In doing so, we will

continue drawing lessons from your very rich and extraordinary life. We will always remember you as a man of integrity who embodied the values and principles that your organization promotes. These are unity, selflessness, sacrifice, collective leadership, humility, honesty, discipline, hard work and mutual respect. We will promote these values and practise them, in order to build the type of society you wanted.

The second is from the funeral of Diana, Princess of Wales:

But your greatest gift was your intuition, and it was a gift you used wisely. This is what underpinned all your other wonderful attributes and if we look to analyse what it was about you that had such a wide appeal we find it in your instinctive feel for what was really important in all our lives. Without your God-given sensitivity we would be immersed in greater ignorance at the anguish of AIDS and HIV sufferers, the plight of the homeless, the isolation of lepers, the random destruction of landmines... For all the status, the glamour, the applause, Diana remained throughout a very insecure person at heart, almost childlike in her desire to do good for others so she could release herself from deep feelings of unworthiness of which her eating disorders were merely a symptom. The world sensed this part of her character and cherished her for her vulnerability whilst admiring her for her honesty.

If the eulogy about you was focused around the qualities other people see in your life through the events they witness, what does this already say about you and your Legacy thus far? Are you pleased with where your thoughts lead you? Or, are you alert to areas of your life you would like to change as the next chapters of your life are written? When it comes to your Life Strategy, with time yet to live and opportunities yet to come, how can you shape your life to leave your preferred Legacy AND fulfill your dreams for an amazing life?

YOUR LEGACY AND THE 4 LIFE QUADRANTS

Let's have a think about our Legacy and have a look at each of the 4 Life Quadrants. What would we like people to say about us in terms of our

Legacy in the each of the areas of Play, Work, Relationship, and Family & Friends?

PLAY – AND YOUR LEGACY

Consider the area of Play in your life. What Legacy would you like to leave behind in this area? I would ideally like to leave behind a Legacy that “*He loved the outdoors and went on many great adventures.*” Examples of Play Legacies from clients I have worked with include:

- » *He loved to camp, compete and be outdoors.*
- » *She balanced her responsibilities with fun and new adventures.*
- » *She always found time to laugh and explore.*

Take a moment to consider what you would like your Legacy to be for Play. Write it down:

WORK – AND YOUR LEGACY

Think about your Work. What Legacy would you like to leave behind? I’d like to leave behind a Legacy that left an imprint on people saying that “*He was inspiring and challenging and he challenged people to be their best.*” Some examples of Work Legacies from clients I have worked with include:

- » *He was not afraid of tough decisions and as a result helped people reach new levels of success and fulfillment.*
- » *She strived to always learn and excel in her profession.*
- » *Everything she did at work added value and made life easier for others.*

What would you like your Legacy to be for Work? Write it down:

RELATIONSHIP – AND YOUR LEGACY

Think about the area of Relationship. What Legacy would you like to leave behind? Me, I would like my Legacy to be that “*He loved his partner passionately and completely.*” Examples of Relationship Legacies from clients I have worked with include:

- » *He was tough at times but really cared for us and passionately loved us.*
- » *She supported and nurtured those she loved.*
- » *She was nurturing and available.*

What would you like your Legacy to be for the Life Quadrant of Relationship? Write it down:

FAMILY & FRIENDS – AND YOUR LEGACY

Finally, let’s think about our family and friends. What Legacy would you like to leave behind? I would like my family and friends to say that “*He was generous, supportive and available.*” Some examples of Family & Friends Legacies from clients I have worked with include:

- » *He was there for us and loved to play.*
- » *She was a positive influence and added joy to the lives of her family and friends.*
- » *She was always there to love and support us.*

What about you? What Family & Friends Legacy would you like to leave? Write it down:

YOUR PERSONAL MISSION STATEMENT

Now that we've had a look at Legacy statements for each of the 4 Life Quadrants it is time to sum up our Legacy statements by writing a Personal Mission Statement. Legacy statements necessarily look *backwards*, however a Personal Mission Statement is looking *forward* to the rest of your life: What will the rest of your life be about? How would you sum this up in one simple Personal Mission Statement?

I would sum it up in my Personal Mission Statement to say that "*I want to help people (including myself) to "Grow and Go for It" in all areas of their life.*" Some other examples of Personal Mission Statements from clients I have worked with include:

- » *To be the best I can be and to make the most of time – as time wasted is gone forever.*
- » *To leave people and places better than when I found them.*
- » *To have loved, laughed, lived and learned.*

What about you? Using your Legacy Statements as a guide, what is your Personal Mission in life? Write it down:

LIFE STRATEGY EXERCISE: YOUR LEGACY AND PERSONAL MISSION IN LIFE

Thinking about what we've just had a look at – your Legacy and Personal Mission across the 4 Life Quadrants – take a moment now to consolidate what we have learned by completing this exercise. Write down in the spaces your preferred Legacy statement for each of the 4 Quadrants – Play, Work, Relationship, and Family & Friends. Then consolidate that into a simple forward-looking sentence that can become your Personal Mission in life. I will do it with you.

MY EXERCISE...

1. PERSONAL LEGACY

AREA	MY LEGACY STATEMENT
1. Play	
2. Work	
3. Relationships	
4. Family & Friends	
My Personal Mission in Life is:	

DR PETE'S EXERCISE...

1. PERSONAL LEGACY	
AREA	MY LEGACY STATEMENT
1. Play	<i>He loved the outdoors and went on many great adventures.</i>
2. Work	<i>He was inspiring and challenged people to be their best.</i>
3. Relationship	<i>He loved his partner passionately and completely.</i>
4. Family & Friends	<i>He was generous, supportive and available.</i>
My Personal Mission in Life is: <i>To help people (including myself) to "Grow and Go for It" in all areas of their life.</i>	

YOUR LEGACY AND PERSONAL MISSION STATEMENT: THE DEBRIEF

How did you go with that exercise?

Spending some time to get in touch with and deeply understand your Legacy is a rewarding and worthwhile experience. It can also be quite difficult. And for some people it can be a major task in its own right, and also quite confronting. It is the foundation for the chapters to come, so by all means go back over what you have written so far if you need to.

Maybe talk it over with a friend. Reflect on it overnight, or after going away for a day or so. Or, come back to it as you go through the next few chapters. You might think of something you should have included, or perhaps you want to adjust the emphasis. After all, it is YOUR Legacy, and your Personal Mission Statement

Let's take a look at how I went. In my completed exercise you can, I hope, see how my (forward looking) Personal Mission Statement gathers up and expresses my (backward looking) Legacy statements. Maybe you can also see possibilities to better express what I am trying to say! No problem: these Statements are 'working documents' for the purpose of keeping me moving on into the next chapters. I encourage you to view your own Statements the same way – good enough to keep moving into the next chapter. You can always come back to these Statements later and prune here and add there if you like.

A good understanding of your Personal Legacy and Personal Mission is the foundation for building an effective Life Strategy. So well done for completing the Legacy and Personal Mission Statements exercise!



CHAPTER SUMMARY AND KEY POINTS

- » Remember that “The Finishing Line Comes First.” The best way to do what you want to do is to begin by working out just what it is you want to do. By considering your Legacy first you will make decisions and take actions that support what you want to do.
- » In this chapter we have taken some time to reflect on our Personal Legacy, at least in a summary way. We have not attempted a full eulogy (though you might like to try this some time), but a more summary “tombstone” statement and Legacy Statements that address each of the 4 Life Quadrants of Play, Work, Relationship, and Family & Friends.
- » We have then used our (backward looking) Legacy Statements as the basis for putting together a (forward looking) Personal Mission Statement.

Now it is time to dream a little...



STEP 2 – LIFE DREAMS: YOUR “BIG PICTURE” VISION

“Whatever you dream you can do, begin it. Boldness has genius and power and magic in it.” ~ Goethe

Having laid the foundation for our Life Strategy by establishing our Personal Legacy and Mission we are ready to take the next step, an exciting step! I love this step of Life Dreams! We are going to get inside that imagination of ours, that ideal space of what an ideal world would look like, dreaming big dreams. We will look at what dreams are, and how dreams are different from goals; sometimes people mix this up.

We then will look at how you can effectively identify your Life Dreams across the 4 Quadrants of Play, Work, Relationship, and Family & Friends. By understanding and writing down your Life Dreams you will have the basis for the next stage of your journey.



In this Step 2 of our Life Strategy Framework, we will ask: *What* are Life Dreams? Defining them. *Why* do they need to be considered at this stage? *How* can you identify your Life Dreams in each of the 4 Life Strategy Quadrants? Then we will complete an exercise. The above quote from Goethe is to help to get us focused for the exciting task of setting our Life Dreams – a vision for our ideal life.

LIFE DREAMS FOR THE ENDLESS SUMMER SURFER

For the Endless Summer surfer, Life Dreams might be about perfect waves in perfect locations with the perfect group of family or friends. *Play* might be focused on fantastic surfing experiences. *Work* might focus on flexible hours and a role that keeps them connected to the ocean. *Relationship* might include sharing a love of surfing with their partner. *Family & Friends* might be about taking time to enjoy the ocean with them.



In this chapter we will identify what your dreams in life are across the areas of Work, Play, Relationship, and Family & Friends.

WHAT ARE YOUR DREAMS IN LIFE?

Life Dreams are the fantasies and ideals for our lives. The accompanying picture might well have the Endless Summer surfer's Life Dreams in mind. Although the sea is looking a bit too calm for perfect waves, the location looks pretty good, and with room for family and friends! For me that image conjures up all sorts of ideals about travelling with family and friends, about tropical paradises, and space, time and enjoyment of the outdoors.

Take a moment to consider this image, and in your mind start to imagine, dream and think about: What are your dreams in life? Does an image, or a scene, come to mind? Perhaps not an island, perhaps something, or somewhere, else.



WHAT ARE LIFE DREAMS?

According to the dictionary “dreams”, in the sense used here, are the mental activity of an imagined series of pleasant events, a sequence of imaginative thoughts indulged in such as a daydream or fantasy. We are *not* here referring to dreams while you sleep. There are various theories about those

dreams, and they are not our concern here. We are concerned with your dreams while you are awake.

Such dreams also represent our cherished hopes, ambitions and aspirations. The visions we have for our ideal life are the motivators and drivers for goal setting and action planning that we will come to in the next two chapters.

LIFE DREAMS: BEING, DOING AND HAVING

When I ask people to say what their dreams in life are, in their initial responses few people can answer the question easily or in a way that is useful. They might be vague in their response, or confused about the question as if it was designed to highlight how unhappy they are. Others respond readily that they wish to be “happy” or “content” – but these, while a starting point, are very general, and, again, don’t amount to a specific vision for their lives.

To identify our Life Dreams and our visions of our ideal world we need to look at specific areas, or categories. A useful approach is to identify such dreams and visions using the following three categories of life experiences: being, doing and having.

1. **Being (living and learning).** Such Life Dreams and visions might include, for example: being a loving and effective parent; being a great cook by creating dishes from recipes from all over the world; and living in harmony with nature, having a low impact lifestyle.
2. **Doing (travel and experiences).** Such Life Dreams and visions might include, for example: travelling the world, climbing mountains and sailing the oceans; meeting amazing friends and finding my life partner; visiting all of the continents of the world and spending time volunteering on local issues; and building a company from start-up to sale.
3. **Having (material needs and wants).** Such Life Dreams and visions might include, for example: a beautiful home by the sea; a holiday house in the mountains; designer clothes and shoes; a luxury car; and a collection of antiques.

Some items that come to mind might cross categories. That doesn't matter. The point is not whether these three categories are exactly right for you, but to assist you to identify *specific* Life Dreams and visions. For example, suppose "having a wide circle of friends" comes to mind when you are thinking about "having". It's not really a material want, but that's OK, as it came to mind under that heading. A second example: Suppose that under "doing" you come up with "helping other people as I see opportunity". That might also relate to "being" – "being in a frame of mind to see opportunities to help people, and then doing so". No matter – you initially thought about it under "doing".

Keep in mind that this is not an exercise in correct categorising of Life Dreams, but is a way for you to come up with a *number* of specific Life Dreams that throb inside you – at least one Life Dream under each category.

LIFE DREAMS TRAP 1: STUCK GETTING STARTED?

If you find yourself stuck getting started on Life Dreams then start wherever you can. For example, if you said you dream in life of being "happy" or "content" then ask yourself the question: "Who would I be spending time with if I was happy and content?" (Being); "What would I be doing if I was happy or content?" (Doing); "What equipment or possessions would I need to use to be happy or content?" (Having).

By taking a simple desired emotional state and applying the "doing", "being" and "having" questions, structure will start to appear giving more clarity and definition to your Life Dreams.

LIFE DREAMS TRAP 2: HOW TO AVOID THE STATUS QUO AND HOW TO AVOID CONFUSING DREAMS WITH GOALS

Life Dreams are not goals and do not need to be achievable; they are the vision of our ideal state for us to be inspired by, as opposed to reflecting the current status quo. I have seen many people struggle with establishing Life Dreams and either set a vision that is simply a reflection of what now is (the

status quo), or instead confuse specific goals and plans with dreams and visions.

They have these struggles for one of two reasons:

1. **Fear of failure.** They do not want to embrace such ideals for fear of failure, disappointment, self-doubt, and/or self-blame – better to settle for a good life than risk a great life.
2. **Fear of success.** They do not want all the hassles of change associated with becoming different, and growing and changing through the process.

An example of setting Life Dreams too low and keeping the status quo may be to aspire to only continue doing what you are doing already, and doing that comfortably and easily for the rest of your life – despite unease and dissatisfaction with your life as it stands. In seeking only to maintain what you already have, you are certainly likely to succeed – but unlikely to grow and develop further. By setting dreams too low, you are also not likely to have any significant new experiences and adventures in life.

An example of confusing goals with Dreams is the goal of climbing Mt Everest. This is a very specific goal rather than a Life Dream (which might be about climbing the high mountains of the world). One of the features of Life Dreams is that potentially there are *always* a number of different possible goals that would fulfil that Dream.

Failure to imagine wonderful Life Dreams results in people missing out on the fun and boldness of imagining an amazing future life. They place a “glass ceiling” over themselves preventing further growth and development, and preventing them acquiring the necessary skills for managing failure, and learning and trying again – so essential in all successful people. Also, they do not have a wide enough vision to be able to adjust and reset goals and action plans when things go wrong, yet still continue to embrace their vision. So... don't go there. Instead, fear neither failure nor success. Dream your dreams, and see your visions.

LIFE DREAMS: A SOURCE OF STRENGTH WHEN THE GOING GETS TOUGH

Life Dreams may be grand and ideal, yet they are crucial ingredients for surviving and persevering through times of hardship. Two quotes:

“He who has a why, can endure any how.” ~ Friedrich Nietzsche

“By making us aware of what we can be, and of what we should become, we make those who have a ‘why’ to live able to bear with almost any ‘how’, a powerful, motivating force in managing the challenges of our lives.” ~ Viktor Frankl

These two quotes highlight the value of Life Dreams when the going gets tough, real tough. Life Dreams, whatever their detail, can give us a source of inspiration, a basis for tolerating all sorts of challenges and difficulties in life.

Viktor Frankl was a Psychiatrist who was imprisoned in a concentration camp in World War II and saw family and friends die and endure one horror after another. One of the things he noted was that he, and those of his colleagues who had dreams or ambitions to survive the ordeal and go on and live meaningful lives, tended to survive and endure much better than those who did not. He told many stories of people who initially appeared to have positive Life Dreams of the future but where it turned out they had only time-specific goals. One man dreamed of spending Christmas with his friends in his local village but, instead of a dream of a Christmas over the coming years, the dream became very specifically about the Christmas of that year; this specific goal, when unfulfilled, left him in despair rather than creating an ongoing hope and he died a few weeks after that Christmas. On the other hand, Frankl’s own hope of being able to return to his practice as a doctor at an unspecified time in the future helped him endure this indefinite and very difficult time in his life.

More recently Jim Stockdale wrote of a similar experience as a prisoner of war in Vietnam in the 1960s. He had, and nurtured, positive and inspiring dreams for the future without tying them to specific goals and timeframes; a critical difference between him surviving and some of his colleagues who eventually lost hope and perished. This important aspect of Life Dreams (as opposed to goals) has since been termed the “Stockdale Paradox” and is a key distinction between dreams and goals. Life Dreams are the primary source of inspiration and motivation when the challenges of life and the

adversities that can come our way might otherwise overwhelm us. Also, having clear Life Dreams can also help us make the most of unexpected opportunities so we stay true to our path when other distractions appear on the horizon.

YOUR LIFE DREAMS AND THE 4 LIFE QUADRANTS

Let's now look at the Life Dreams we have in each of the 4 Life Quadrants.

PLAY – AND YOUR LIFE DREAMS

Consider the area of Play in your life: What does your ideal world look like? What visions and Dreams do you have for your life in the area of Play? For me, when I think about Play, my Life Dream is *“to travel the world, climb mountains and surf the oceans with family and friends.”* Some other examples of Play Life Dreams from clients I have worked with include:



- » *To be able to travel wherever and whenever I want to with family and friends without my business and work interfering.*
- » *To be healthy, fit and energetic to enjoy new experiences all over the world.*
- » *To embrace life, travel and explore the world.*

What about you? Take a moment to think about your Life Dreams in the area of Play. Write them down:

WORK – AND YOUR LIFE DREAMS

Consider Work. What does your ideal Work world look like? What visions and Dreams do you have in this area of your life? For me, *“I dream to be a*

part of an enduring company with the individual freedom to help others.”
Some other examples of Work Life Dreams from clients I have worked with include:

- » *Being able to use my talents to improve the quality of life of others, and enable others to reach and fulfill their potential.*
- » *Have a mix of business interests that allow me to live a comfortable life focusing on my family, friends and interests.*
- » *Be able to work independently and autonomously within a collaborative work group.*

What about you? Take a moment to think about your Life Dreams in the area of Work. Write them down:

RELATIONSHIP – AND YOUR LIFE DREAMS

Let's have a look at the Life Quadrant of Relationship. What does your ideal world look like? What visions and Dreams do you have in this area of your life? For me, *“I dream of being in a wonderful loving relationship for the rest of my life.”* Some other examples of Relationship Life Dreams from clients I have worked with include:

- » *Each of us flourishing in our own areas with passion and being better together than apart.*
- » *Be “in love” for the rest of my life and be loved for who I am.*
- » *Be happy and content with my life partner.*

What about you? Take a moment to think about your Life Dreams in the area of Relationship. Write them down:

FAMILY & FRIENDS – AND YOUR LIFE DREAMS

Finally, let's consider our Family & Friends. What does your ideal world look like? What visions and Dreams do you have in this area of your life? For me, *"I dream of being a super cool dad to my children, and having great adventure buddies and close family ties."* Some other examples of Family & Friends Life Dreams from clients I have worked with include:

- » *Having people to share experiences with – to adventure together and be energetic and positive together – the fuel of life.*
- » *To see generations of my family grow up to be healthy and happy and to laugh and have good times with those closest to me.*
- » *To love, support and equip my closest friends and family to live amazing lives.*

What about you? Take a moment to think about your Life Dreams in the area of Family & Friends. Write them down:

EXERCISE: YOUR LIFE DREAMS

Now that we've had a chance to understand what Dreams are, learn the difference between Dreams and goals, and start to consider what Life Dreams we have for the 4 Life Quadrants, let's bring together what those are for Play, Work, Relationship, and Family & Friends. Take a moment and jot down what your ideal world, your Life Dreams, are for each of these four areas. I'll then share with you my exercise.

2. MY LIFE DREAMS	
AREA & LEGACY	LIFE DREAMS (MY IDEAL WORLD...)
1. Play	

2. Work	
3. Relationships	
4. Family & Friends	

Let's have a look now at my results of my completed exercise.

2. DR PETE'S LIFE DREAMS	
AREA & LEGACY	LIFE DREAMS (MY IDEAL WORLD...)
1. Play – <i>He loved the outdoors and went on many great adventures.</i>	<i>To travel the world, climb mountains and surf the oceans with family and friends.</i>
2. Work – <i>He was inspiring and challenged people to be their best.</i>	<i>To be a part of an enduring company that helps others.</i>
3. Relationships – <i>He loved his partner passionately and completely.</i>	<i>Be in a wonderful loving relationship for the rest of my life.</i>
4. Family & Friends – <i>He was generous, supportive and available.</i>	<i>Be a super cool dad to my children and have great adventure buddies and close family ties.</i>

LIFE DREAMS: DEBRIEF, REVIEW, AND CROSS-CHECK

How did you go with that exercise, having a look at your Life Dreams, stretching out your imagination and really thinking about what your ideal world would be? For some people, a bit like Legacy, really freeing up your imagination and thinking big is not as easy as it sounds. And if you struggled with that, that's OK. For others, you might have already harbored

some visions and fantasies of what your ideal world would be like, and I hope this exercise has been an opportunity for you to flesh out what that wonderful world looks like for you.

On reviewing my Life Dreams, each seems to me to meet the three tests we have discussed earlier in this chapter:

1. Looking forwards.
2. Not too general, and clearly going beyond my status quo.
3. Not too specific (there are a number of possible goals that might fulfill each Dream).

What do you think?

What about you and your Life Dreams? Can you also say that they meet these three tests? Now is the time to review any of your Life Dreams that you feel do not meet these tests, and see if you can fine tune them so they do. If this proves a bit difficult, by all means go with what you have – it may be something to look at again at a later time, or maybe talk it over with a friend or colleague.

CROSS-CHECK

The last task for this chapter – and it is a task we will do for the next two steps also – is to cross-check. In this chapter we cross-check our Life Dreams with our Personal Legacy. We do that so that we ensure our preferred Personal Legacy is compatible, and well compatible, with our Life Dreams.

So take a moment now and reconnect with the Personal Legacy statements you wrote down in the previous chapter. Have a look at your Life Dreams and make sure they go hand-in-hand – “By living the Dream, I’ll achieve the Legacy”. The way to do this is with your completed Personal Legacy statements *alongside* your completed Life Dreams statements, as they are above.



Once you’ve got that clear – that is, your Personal Legacy statements and your Life Dreams statement are congruent, or matching – we are ready

to get on with the next Step.



CHAPTER SUMMARY

- » This chapter has been about getting inside our imagination to connect with what our ideal world would look like, to dream big dreams.
- » We have established at least four Life Dreams – one [at least] in each of the 4 Life Quadrants. Remember, Life Dreams are forward-looking and go beyond our current state of affairs (or status quo), yet are not too specific – they potentially could be fulfilled in a number of different ways.
- » We have cross-checked our Life Dreams against our preferred Personal Legacy, and are now ready to set some goals.



STEP 3 – SETTING GOALS: GET SOME STRETCH

“Goals are not only absolutely necessary to motivate us. They are essential to really keep us alive.” ~ Robert H. Schuller

Now we have established our Personal Legacy and developed our big picture Life Dreams, in this chapter we will set Goals – the concrete, specific Goals that we need to start focusing on in order to live those Dreams and leave that Legacy. We begin by looking at Goals, SMART Goals, Stretch Goals, and bucket lists.

Then we will set Goals for ourselves as part of our Life Strategy, across the 4 Life Quadrants of Play, Work, Relationship, and Family & Friends. This will include an exercise for you to set your Goals so that you can live your Life Dreams. Then cross-check.



GOAL SETTING FOR THE ENDLESS SUMMER SURFER

For the Endless Summer surfer, Goals might be to visit specific countries and surf at specific beaches. In the area of *Play* there might be a list of locations and surfing beaches to experience with specific *Family & Friends*. There will likely be a need for particular *Work* income Goals and working arrangements. Specific characteristics and attributes may well be needed in the surfer and in their partner for a *Relationship* to work effectively.



In this chapter we will examine: What Goals have you set for yourself to be able to Live Your Dreams and Leave Your Legacy? What are the specific Goals you need to identify in each of the areas of Play, Work, Relationship, and Family & Friends?

BUT WHAT EXACTLY IS GOAL SETTING?

Goals are the concrete and specific objectives that are how we turn our dreams into reality. Goals are *what* you intend to achieve. They are specific in that later you can measure, count or in some other way evaluate whether you achieved them.

- » You *fulfill* a Dream. Or not.
- » You *achieve* a Goal. Or not.

The Endless Summer surfer’s Goal to visit specific countries and surf at specific beaches can later be evaluated. For example, your Goal was to visit these 10 beaches in these 5 countries over the next 2 years. Did you achieve this? Or not?”

What Goals have you set for yourself, and what Goals will you set for yourself so that you *in fact*, in practice, Live your Dreams? Take a moment now and in your mind reconnect with those wonderful Life Dreams that you’ve just identified in the previous chapter. How will you go about fulfilling those Dreams, turning the Dreams into reality? What are the next steps? Start to consider the specific Goals that you need to set to begin turning your Life Dreams into your life reality.

Setting personal Goals is a major component of personal development. For example, an athlete who wants to maintain a high level of fitness (a Life Dream) might decide to run 5 kilometres (km) a day and sets that as their Goal. A parent who wants “quality time” with their children (a Life Dream) might set a Goal of using at least 45 minutes per evening on at least four nights per week in this way.

The techniques of SMART Goals, Stretch Goals, and Bucket Lists each help us to “mould” our Goals into something we can really commit to. But keep in mind that SMART, Stretch, and Bucket Lists are just techniques, or tools, to sharpen our Goals so that they really work for us. The point is to

milk these techniques for what you can get out of them... and keep moving forwards. Let's take a look at each of these goal setting techniques now...

SMART GOALS

Now that we have got the basics of Goal Setting understood I want to have a look at the first of the techniques we use when setting a Goal known as S.M.A.R.T. SMART stands for Specific, Measureable, Attainable, Relevant and Time-bound.

SMART Goals are one of the key inputs to an effective Life Strategy. They originally came from business and management principles that go back to the early 1980s and were applied in many business, government, and community-based organizations. Where these principles were applied, each organizational, departmental, and section objective needed to be:

- » *Specific* – target a specific area for achievement
- » *Measurable* – quantify, or at least suggest an indicator of progress
- » *Attainable* – state what results can realistically be attained
- » *Relevant* – link to wider objectives
- » *Time-bound* – specify when the result(s) can be achieved.

This approach works well at a personal level also.

SMART GOALS AND LIFE STRATEGY

We now look at how to apply the SMART approach to setting our personal Goals.

SPECIFIC

The opposite of specific is (wait for it... drum roll...) *not* specific – that is, unclear, ambiguous, vague, insignificant, builds in “let-outs”, or too qualified. So, to stay with our two examples above, *I will run 5km a day* is very specific, much more so than: *I will maintain and exceed my current daily distance of running* (which leaves unclear just what *my current daily distance of running* means, and just what *exceeds* means); *I will run 5km a day whenever possible* (and who is the one to say whether it is possible? –

unclear, ambiguous and vague); *I will run 5km a day unless it is raining, I get an early work call, or I have a headache* (forget it!).

MEASURABLE

A simple way to understand measurement is to ask: “Can I put a number on it?” To say *I will run 5km a day at least 5 days a week* is measurable in two ways – amount and frequency. Much better than *I will run 5km a day unless it is raining* (just what is your definition of ‘rain’? A shower in the night? Some dark clouds out there when you otherwise would have begun?).

ATTAINABLE

There is no point in setting a Goal that you know in advance you will not achieve. You immediately saddle your so-called Life Strategy with frustration and failure. We are not here talking about Dreams, visions and ideals. We are talking about what you will commit to do. Maybe when you think about it *45 minutes quality time with my children at least 4 nights per week* probably won’t happen, but what could be attainable might be *45 minutes quality time with my children at least 2 nights per week and one day on the weekend*.

RELEVANT

So, you have some Goals that are Specific, Measurable and Attainable. But are they relevant to you? It can be easy to contemplate a Goal that is exotic, or modeled on what someone else does, or that in fact will compete with some other Goal you have. You might have a friend who maintains a high level of fitness and who tells you that she does so primarily by running 5km, and, given you can run 4km no worries, you think, “That sounds like a good Goal.” But is that the point for you? Might you do better to add in some swimming, or resistance exercises, or stretching?

TIME-BASED

This means that your Goal has a time limit for completion. *Run 5km a day* is time-based – you measure it every day. *Quality time of at least 45*

minutes per evening 4 days a week is measurable, per day for the evenings when you have such quality time, and per week. A so-called Goal of *I will spend regular quality time with my children* is not really a Goal at all. Just how much time would amount to “quality time”? Just what does “regular” mean?

TIP: SETTING SMART GOALS

When it comes to Life Strategy and Living the Endless Summer, setting Goals that are SMART is the way to go. Be relentless: each aspect of SMART should be present in each of your Goals. Don't be too concerned about this as you first come up with ideas for your Goals, but look closely at each Goal so you gradually mould it into shape so that it is SMART.

If you get a mental block while preparing a Goal try talking it over with someone else. A SMART Goal should feel like it's what you really want to do. If you are fighting against it, then keep working at it until it feels good, something you can really commit to.

STRETCH GOALS

A *Stretch* Goal is a Goal that initially seems difficult, perhaps too difficult to achieve. One definition of a Stretch Goal is “a Goal that cannot be achieved by incremental or small improvements but requires extending oneself to the limit to be actualized”. This has been expressed in the saying, “You cannot cross a chasm in two steps.”

As with SMART Goals, Stretch Goals also had their origins in company management principles and practice. The term “Stretch Goals” has been attributed to then CEO Jack Welch during USA company General Electric's golden years late last century, and describes the process of asking for “the almost impossible” as a method to get work units to reach beyond what they had previously thought possible to achieve outstanding results year after year.

Stretch Goals as a concept has also had its share of doubters with some people criticizing the concept as demoralizing, and as undermining people's self-confidence when they fail. Well, that is not how it works. Read on!

I love the saying: “*Shoot for the moon. Even if you miss, you’ll still land among the stars*” (Norman Vincent Peale). Stretch Goals that are ultimately not achieved can still trigger additional growth and new levels of performance, discipline and fun – things we might never have experienced had we not been pursuing the *additional* stretch. That is the key: You set a SMART Goal as above, then stand back and ask, ‘How can I stretch that Goal?’”

SETTING STRETCH GOALS

Stretch Goals are relative to a person’s pre-existing ability and means. For example *buying a new car this year* would not be a Stretch Goal, perhaps on its own hardly even a Goal, for someone who can easily afford it, but could be a Stretch Goal for someone who has little money and who is out of work. The first person can simply walk into a dealership, pick a car, pay cash for it, and drive it away. The second person might be looking at some tough challenges to adopt this as a Stretch Goal. Their Goal might be *to buy a good quality car this year*, with *buy a new car this year* as their Stretch Goal. Perhaps for the new car to be *attainable* they will need an associated stretch income Goal.

Stretch Goals can also be considered as breakthrough Goals, because when you have achieved such a Goal, you have broken through to a whole new level.

How do you know when you have set a Stretch Goal, that is, a Goal that is SMART but that has added stretch? The first answer is above: you set a SMART Goal, and then look at how to stretch it. The second answer is to consider the three factors of Aspiration, Leverage, and Convergence.

- » **Aspiration:** An aspiration is a “lofty or ambitious desire”. If you stretched your Goal in the direction of “lofty” or “ambitious”, what would it now look like? Does the “quality” car then become a “new” car?
- » **Leverage:** A lever enables you to move or lift an object that otherwise you could not move or lift. Is there a way you can lever your Goals, or your resources, so that a Stretch Goal is still SMART? For example, if your Life Dreams include maintaining a high level of fitness AND having quality time with your children,

might there be an *additional* possible Goal that helps to achieve both?

- » **Convergence:** Convergence is about exploiting opportunities where your Goals are compatible with, perhaps even support, someone else's Goals. The questions to ask yourself are: "Who will I need to collaborate with to achieve this Goal?" and "If I collaborated with someone else could I stretch this Goal?" An old Greek saying is: "*Alone we can be great; together we can be greater.*" Stretch Goals allow people to come together to create something larger than themselves.

BUCKET LISTS

The Bucket List is another technique to refine your Goals. A Bucket List is a list of things you want to do before you die. The term comes from the euphemism for dying: "to kick the bucket". What do you want to do before you kick the bucket? Would you like to climb the Eiffel Tower? Summit Mt Everest or go trekking in the Himalayas? See the Northern Lights? Run a marathon? Go to a Grand Slam tennis tournament or Formula 1 Grand Prix? Learn a foreign language? Go for a hot air balloon ride? Learn to dance the Tango?

The contents of your bucket might give you a fresh angle on what really matters to you. Life Strategy is about understanding and pursuing what really matters to you. More abstract terms such as strategy and Goals need to be firmed up, colored in, made specific. Thinking about what is in your bucket might help you to do this.

The point of creating your Bucket List is to help maximize your life. We can use our Bucket List as yet another tool to help us to take charge, to take responsibility for ourselves, to do what matters to us. Here are some sample questions to get you thinking about what you have, or might like to have, in your Bucket List:

1. What do you wish you could do before you die?
2. What would you do if you had unlimited time, money and resources?
3. What have you always wanted to do but have not done yet?

4. Any countries, places or locations you want to visit?
5. What activities or skills do you want to learn or try out?
6. What would you like to say/do together with other people? People you love?
7. Are there any particular people you want to meet in person?

What are 5 items you can put on your Bucket List?

1. _____
2. _____
3. _____
4. _____
5. _____

WHAT HAPPENS WHEN YOU DO NOT HAVE PERSONAL GOALS?

“Every man dies – Not every man really lives.” ~ William Ross Wallace

People who live without Goals and plans can feel caught up in busyness, day-to-day activities where you look back and wonder where the time has gone. They may sense a lack of achievement, that they are not getting anywhere. If you think back over, say, your last three months, ask yourself:

- » Three months ago, what was I aiming to achieve over the next three months?
- » What have I achieved over the last three months?
- » What opportunities have I taken?
- » What opportunities have I missed?
- » What are my Goals for the next three months?

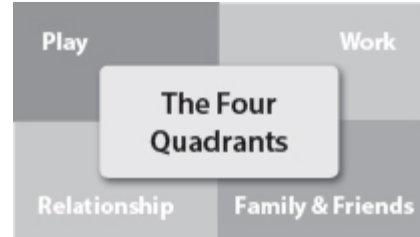
GOAL SETTING AND THE 4 LIFE QUADRANTS

Let's set some Goals in each of the 4 Life Quadrants.

PLAY – AND GOAL SETTING

Start by thinking about those Life Dreams you had for Play. Let's set some Goals for you to live this Dream. And let's also think about what your Stretch Goals would look like.

One Play Goal I have is *to climb Mount Kilimanjaro in Africa*. And my Stretch Goal would be not only to climb that mountain but also two other “highest mountains” across the world all in the same year (e.g., Mount Kinabalu in Borneo and Mount Kosciusko in Australia) – OK, Kosciusko is not all that high, but it is the highest in the continent of Australia.



What are your Goals, and Stretch Goals, in the area of Play?

PLAY – GOALS AND STRETCH GOALS		
DREAM	GOAL	STRETCH GOAL
Dr Pete <i>Travel the world, climb mountains, and surf the oceans with family and friends.</i>	<ul style="list-style-type: none"> • <i>Climb Mt Kilimanjaro in Africa this year.</i> • <i>Take at least 3 weekend surf trips with family this year.</i> 	<ul style="list-style-type: none"> • <i>Climb Mt Kilimanjaro, Mt Kinabalu (Borneo) and Mt Kosiusko (Australia) – “The 3 Ks” – in 12 months.</i> • <i>Take 4 weekend surf trips this year.</i>
Me		

WORK – AND GOAL SETTING

What about Work? Think about those Life Dreams you have for Work. Set some Goals for you to be able to live this Dream. Then think about what Stretch Goals would look like for Work.

A Work Life Dream I have is, as set out in the previous chapter, to be part of an enduring company that helps others. My related Work Goal is *to ensure my role in the company, both this year and ongoing, helps to make the company enduring, and is about helping others*. A Stretch Goal for me would be to take a leading role in that company during the course of this year, for example by becoming a partner or owner/part owner of the company.

What about you? What are your Goals and Stretch Goals for Work?

WORK – GOALS AND STRETCH GOALS		
DREAM	GOAL	STRETCH GOAL
Dr Pete <i>To be part of an enduring company that helps others.</i>	<ul style="list-style-type: none"> • <i>Ensure my role in the company, both this year and ongoing, helps to make the company enduring, and is about helping others.</i> 	<ul style="list-style-type: none"> • <i>Become a partner or owner/part owner of that company this year.</i>
Me		

RELATIONSHIP – AND GOAL SETTING

Let's take a look at Relationship and think about your Life Dreams in this area. Set some Goals on how to live this Dream, as well as what some Stretch Goals might look like.

My Relationship Dream is *to be in a wonderful loving relationship for the rest of my life*. But at the time I was first writing this book, my previous relationship had ended, so to dream about a wonderful, loving relationship for the rest of my life seemed like a challenging Life Dream. It raised a few issues, such as the kind of person I might get on with well enough to make it likely the Dream might be fulfilled – her personality, her Life Dreams and Goals, and more.

One of the Goals for me was *to begin dating again this year*. That is, I would be proactive, I would take the initiative, and I would seek to keep my Goal (wonderful, loving, rest of my life) firmly in mind. I did not want to

sit around going over and over the past. Clearly I needed to reflect on the past, but I needed to take initiative as well. My Stretch Goal was *to find my ideal life partner and marry her* (no surprise, I guess, about that Stretch Goal).

What about you? What are your Relationship Goals and Stretch Goals?

RELATIONSHIP – GOALS AND STRETCH GOALS		
DREAM	GOAL	STRETCH GOAL
Dr Pete <i>To be in a wonderful loving relationship for the rest of my life.</i>	<ul style="list-style-type: none"> • <i>Begin dating again this year.</i> • <i>Practice good boundaries and communication.</i> 	<ul style="list-style-type: none"> • <i>Find my ideal life partner and marry her.</i>
Me		

FAMILY & FRIENDS – AND GOAL SETTING

Our last Life Quadrant is Family & Friends. Goal setting in this area will enable you to reconnect with those Life Dreams you came up with for your Family & Friends, and to put in place some Goals and Stretch Goals for living that Dream.

When I think about Goals and Stretch Goals in the area of my Family & Friends one of my Goals would be to go camping with my family during school vacation at least once each year. A Stretch Goal would be to go overseas and visit several different countries with my family – say, at least one such visit and country per year.

What about you? What are your Goals and Stretch Goals for your Family & Friends?

FAMILY & FRIENDS – GOALS AND STRETCH GOALS		
DREAM	GOAL	STRETCH GOAL
Dr Pete	<ul style="list-style-type: none"> • <i>Go camping with</i> 	<ul style="list-style-type: none"> • <i>Go overseas and visit</i>

<i>Be a super cool dad to my children and have great adventure buddies and close family ties.</i>	<i>my family during school vacation at least once per year, including this year.</i> • <i>Weekly dinners with extended family.</i>	<i>several different countries with my family – say, at least one such visit and country per year.</i>
Me		

GOAL SETTING: DEBRIEF AND REVIEW

Let's stop and review your Goals and Stretch Goals:

1. Are your Goals SMART?
-

2. Are your Stretch Goals SMART?
-

3. Are your Bucket List ideas embedded in your Goals or Stretch Goals?
-

SELECTING GOALS TO FOCUS ON AND CROSS-CHECK

Now that you've spent some time thinking about your Personal Legacy and your Life Dreams, and developed some Goals and Stretch Goals for each of the 4 Life Quadrants, it's time to cross-check, and to select the Goals you will focus on for our next module, Action Planning.

Complete the exercise below for each of your 4 Life Quadrant areas. Note down your Life Dreams, Goals and Stretch Goals (you have already completed these in the tables above). The two new tasks are to:

- » Identify your current Priority Goal in each of the 4 Life Quadrants as a basis for Action Planning in the next chapter.

- » Cross-check your Goals and Stretch Goals against each other and across your Life Dreams. Are there any aspects that you might fine tune?

ME

GOAL SETTING			
DREAM	GOALS	STRETCH GOALS	CURRENT PRIORITY
1. Play			
2. Work			
3. Relationship			
4. Family & Friends			

DR PETE

GOAL SETTING			
DREAM	GOALS	STRETCH GOALS	CURRENT PRIORITY
<p>1. Play <i>Travel the world, climb mountains, and surf the oceans with family and friends.</i></p>	<ul style="list-style-type: none"> • <i>Climb Mt Kilimanjaro in Africa this year.</i> • <i>Take at least 3 weekend surf trips with family this year.</i> 	<ul style="list-style-type: none"> • <i>Climb Mt Kilimanjaro, Mt Kinabalu (Borneo) and Mt Kosiusko (Australia) – “The 3 Ks” – in 12 months.</i> • <i>Take 4 weekend surf trips this year.</i> 	<ul style="list-style-type: none"> • <i>Climbing the “K” mountains in one year.</i>
<p>2. Work <i>To be part of an enduring company that helps others.</i></p>	<ul style="list-style-type: none"> • <i>Ensure my role in the company, both this year and ongoing, helps to make the company enduring, and is about helping others.</i> 	<ul style="list-style-type: none"> • <i>Become a partner or owner/part owner of that company this year.</i> 	<ul style="list-style-type: none"> • <i>Become a partner or owner/part owner this year.</i>
<p>3. Relationship <i>To be in a wonderful loving relationship for the rest of my life.</i></p>	<ul style="list-style-type: none"> • <i>Begin dating again this year.</i> • <i>Practice good boundaries and communication.</i> 	<ul style="list-style-type: none"> • <i>Find my ideal life partner and marry her.</i> 	<ul style="list-style-type: none"> • <i>Begin dating again.</i>
<p>4. Family & Friends <i>Be a super cool dad to my children and have great adventure buddies and close family ties.</i></p>	<ul style="list-style-type: none"> • <i>Go camping with my family during school vacations at least once per year, including this year.</i> • <i>Weekly dinners with extended family.</i> 	<ul style="list-style-type: none"> • <i>Go overseas and visit several different countries with my family – say, at least one such visit and country per year.</i> 	<ul style="list-style-type: none"> • <i>Go camping with family during school vacations.</i>

CROSS-CHECK

Now have a look at your Goals and Stretch Goals and check that they are compatible with your Life Dreams, and really support you being able to fulfill these. Are these Goals going to help you not only live the dream but leave the positive Personal Legacy you seek? Make any adjustments you need so that there is congruence, so that things match, and that by achieving these Goals you really will live your Life Dreams and leave your preferred Personal Legacy.



STEP 4 – ACTION PLANNING: THE DEVIL IS IN THE DETAIL

“When it is obvious that the goals cannot be reached, don’t adjust the goals, adjust the action plans.” ~ Confucius

“The devil is in the detail.” ~ Unknown

We are now in the final step of developing our Life Strategy to live the Endless Summer. This step is Action Planning, which occurs when you take your Goals and develop a “doing” plan so that in fact you achieve that Goal. The Action Plan has 6 steps in it. We want to achieve our Goals because in doing so we live our Life Dreams and leave our preferred Personal Legacy. So, let’s begin to Action Plan how we will achieve the Goals we have set.

- » Our Life Dreams are about what our visions and dreams are.
- » Our Goals are about how we propose to live our Life Dreams.
- » Our Action Plan is about how we propose to achieve our Goals.

ACTION PLANS FOR THE ENDLESS SUMMER SURFER

The Endless Summer surfer needs to take a large number of detailed steps to achieve their Goals and so live their dreams. In order to follow the summer season and visit specific countries and beaches (*Play*), they might need to learn new languages, organize complex travel plans and health checks, and take the necessary steps to ensure their physical fitness.



To achieve their *Work* income Goals they may need to work extra hours, and to start “setting the scene” with work managers and colleagues to obtain the flexible *Work* arrangements that will be necessary. How will their

Relationship function while they are away? Will their partner travel with them, or what other arrangement might be satisfactory to themselves and their partner? They will need to consider communication arrangements with *Family & Friends*, such as phone and/or Internet, arrangements that will be satisfactory for all parties.

Support Networks for the Endless Summer surfer might include: Mentors to help stay focused on Goals; Friends who can help with specific issues, be that surfing skills or local customs; and Professionals who can help to manage finances, travel plans and health. Setbacks for the Endless Summer surfer might include delays and cancellations in travel plans, poor weather and waves, ill health, running out of money, or other unforeseen circumstances.



The success or failure of ambitious Goals often lies in the ability to plan thoroughly and accurately – hence the expression “The devil is in the detail.” This saying derives from the earlier phrase, “God is in the detail”, attributed to the German-born minimalist architect Ludwig Mies van der Rohe (1886–1969), and expressing the idea that in order to succeed with a grand ambition, planning should be done thoroughly as the details are crucial.

ACTION PLANS ARE ESSENTIAL IN LIFE STRATEGY

Action Plans are the last step to complete in building our Life Strategy to Live The Endless Summer, having already established our Personal Legacy, Life Dreams and Goals. Any major Goal you want to achieve in life will have many detailed steps to make it happen; it is in these details where success or failure will occur. Good Action Plans also address support networks, and setback plans. Start to think about the Goals you’ve just set and prioritised. What steps and details do you need to plan? What support networks do you need to have in place? And what setbacks do you need to be prepared for?

ACTION PLANS: A DETAILED MAP TO ACHIEVE YOUR GOALS

The picture above is an old-style map of the world with a compass. For me this represents the detail and the vastness of all the opportunities and the issues we have to consider in identifying the many detailed strategies and steps that are necessary to achieve our Goals.



Stop for a moment and think about each of the 4 Life Quadrants and the Goals that you have now set, and start to map out all the bits and pieces that have to come together so that you can achieve your Goals.

An Action Plan has built-in deliverables with deadlines and sets in motion the steps needed to achieve your Goals. If it doesn't, it is not an Action Plan – certainly it is not an Action Plan with any likelihood of success. Action Plans set out *what* to do and *how* to achieve specific Goals. They are *about* action, and are focused solely on achieving particular Goals; they are not *about your* ideas about life.

EFFECTIVE ACTION PLANS: SIX STEPS

There are six steps to an effective Action Plan:

1. Define a specific Goal.
2. List all the strategies and steps involved.
3. Identify the resources.
4. Establish the timelines and any critical paths.
5. Develop any necessary support networks.

6. Plan ahead for any setbacks.

Let's take a look at each of these six steps.

STEP ONE: DEFINE A SPECIFIC GOAL

You need a separate Action Plan for each Goal. You might put them all together later. If you finish up with say, four Action Plans, one for each priority Goal, you might find it useful to have them all in one document. As we see in our crosscheck, this can be useful in its own right. But at this stage you need to focus separately on each Goal. So, one Action Plan per Goal.

You must be able to write down a specific Goal and note also if it is a Stretch Goal. That should be easy right now as you did this in the previous chapter. It does not matter in what order you select your Goals for this purpose, that is, whether you look first at a Goal for Play, Work, Relationship, or for Family & Friends. Each Goal needs to be considered in its own right, with an Action Plan to be developed per Goal.

A common mistake is to write down something that's more of a Dream, vision, or even Legacy rather than something as specific as a Goal. That should not occur for you right now because you have developed your Goals in the previous chapter.

Another common mistake is to write down more than one Goal in the same space (for example, get fit and run a marathon). Despite the similarity between the Goals they will not necessarily have identical strategies, resources, timelines, etc. The timeline to become fit will need to be completed before it would be practicable to run a marathon. If the Goal is to run a marathon, then getting fit likely would be a necessary step on the critical path to achieving the Goal (more on the critical path below).

You might be surprised how often this first part of the Action Plan is done incorrectly. It is the foundation for all that follows, which is why we have just taken a chapter to do this step.

STEP TWO: LIST ALL THE STRATEGIES AND STEPS INVOLVED

The task here is to write down the various distinct strategies and steps needed to achieve the Goal.

For example if the Goal is to “complete a marathon this year” then strategies might include developing a training schedule for ramp-up and tapering, preparing a nutrition plan, event selection including build-up events, obtaining and breaking-in equipment (running shoes, clothes, timers, drink bottles etc.) prior to the event, and managing Family & Friends through the process.

You may well find that over time you add to this list, and add additional points to items within the list. That is OK. Be as complete as you can at this stage and you can come back to it as you go along.

But try not to miss anything on the critical path. For example, if you need a visa for where you are going, you need to find out early how long this will take and apply in enough time. You want to avoid “suddenly” thinking of a step you should have commenced some time before.

The point at this stage is to list the strategies and steps in enough detail that you are unlikely to be surprised later, and, in particular, to be surprised that you “suddenly” do not have enough time.

STEP THREE: IDENTIFY THE RESOURCES

Resources are about more than money. While it is true that I need to have enough money to do whatever it is I need to achieve my Goal, resources are more, likely much more than that. Generally a critical resource is time. Money also may well be a requirement to achieve many Goals. Think also about people you might need to help you, and other resources, and note these down.

For example with our Marathon Goal we need money to purchase equipment such as running shoes, clothes, timers, drink bottles, nutritional supplements, event registration fees, transport, and accommodation. We also need specialized people in our resource list – such as training partners, coaches, and health practitioners. When it comes to preparing for a marathon one of the biggest resources we need is time – time to put in the long training hours needed, and without jeopardizing our other Work, Relationship, and Family & Friends Life Quadrants.

Resources need to be monitored as you go. Underestimating resources is one of the two most common reasons for failure to achieve a Goal (the

other is underestimating time – see below). Sometimes it is only as you go along that the need for a particular resource, or more of a particular resource, such as money, becomes apparent. But if at that point you do not have access to additional resources then your Goal might be jeopardized. So aim to be realistic, comprehensive and accurate on your assessment of resources required.

STEP FOUR: ESTABLISH THE TIMELINES AND ANY CRITICAL PATHS

This step is about establishing *due dates* – the dates by which particular steps need to be completed, the date the completion of that step is due. The due date principle ties in with establishing *critical paths*, or *sequences* of steps. That is, some steps cannot be completed before others. In some cases a particular step cannot even be commenced before another is completed. Once we have considered due dates and any critical paths we can prepare a *timeline* for achievement of the Goal.

Due dates and critical paths help us to be *accountable*, as well as helping us to understand if there are *slippages* in our Action Plan because we've missed certain due dates in our timeline.

- » *Accountable*: It is easy to blame time problems, whether slippages or failing to detect a critical path, on someone else – *they* let you down, *they* said *they* would deliver and *they* did not. Yes, that sort of thing can happen, but often could have been predicted, or at least the possibility thought of and allowed for.
- » *Slippages*: Although time estimates should always be as realistic as possible, generally there will be slippage somewhere. The issue then might be whether slippage in one aspect can be made up in another way. You need to be particularly vigilant for any slippage within a sequence of steps, as that will push out all the subsequent steps in the sequence.

Let's continue on with our Marathon Goal; timelines will be critical in Action Planning to achieve this Goal. Depending on our current capability we will need enough time to improve our running fitness and ability to be able to run 42 kilometres. Setting a realistic timeline for improving this

capability is essential – too short and we risk injury and failure; too long and we risk boredom and loss of interest.

Timelines are also useful in enabling us to map out the dates and times of other critical events – be that life events that may conflict with our Goal or other Goal-driven events that may serve as back up plans. For example, if I have a Family & Friends Goal of a one month vacation for all of January, then I might be unable to accurately plan a training and nutrition schedule for my Play Goal to take part in a marathon to be run on 1 February; one or the other of those Goals will need to be adjusted.

An example of thinking out a critical path: I need new running shoes for the marathon, and I need to have run in them a few times before the actual event. But I don't need them to start training; I have some old runners that will be fine for that. But I do need to schedule specific times for training runs, and building towards the marathon distance, and taking into account my current level of fitness. I might decide I need two months specific training to build up for the marathon. While new runners are on my mind, if I don't buy them until two weeks before the event, that will be fine. Whoops! The marathon is two months away. So I start training tomorrow morning because that is what my critical path tells me. Plenty of time to buy new runners; the due date for new runners is still six weeks ahead.

STEP FIVE: DEVELOP ANY NECESSARY SUPPORT NETWORKS

Effective Action Plans take into account family, friends, colleagues, mentors and/or paid professionals who we might need to engage with on specific issues to achieve our Goals. Support networks are often crucial, may take a lengthy period of time to establish, and can be formal or informal in nature. Establishing the right group of friends, mentors and/or professionals is not always easy to do, and the time and effort involved can be underestimated. Sometimes establishing your support network in your Action Plan can become a major Goal in its own right requiring a sub-plan or subsequent Action Plan just to get the support network right.

Support networks will be critical for success as we Action Plan our Goal of completing a marathon. We will need training partners; possibly this support network can be developed quickly through a running or fitness club, or more gradually through networks of friends and colleagues. We

might also need mentors and professionals for specialized training, nutrition and motivation issues. We might need a supportive boss and colleagues at work who can accommodate some flexibility in our hours of work so we can meet training demands. Finally, and perhaps most critically, we will need Family & Friends who support us in achieving our Goals, whether passively by being understanding about and accommodating our changed routine, or actively by participating in various routines as our preparation affects our lifestyle, such as training with us or following a similar diet.

STEP SIX: PLAN AHEAD FOR ANY SETBACKS

Setbacks are unforeseen delays or disruptions we might experience along the road to achieving our Goals. Setbacks to achieving a Goal of completing a marathon might include:

- » Issues among Family and/or Friends
- » Political and security issues
- » Personal injury
- » Financial issues.

This step is about identifying and understanding what kind of setbacks might occur in your Action Plan that might negatively impact on your ability to achieve your Goal, and includes preparing *allowances* or *Contingency Plans* to deal with any such setbacks. Contingency Plans are pre-prepared Action Plans ready to implement in the event of a range of possible adverse events occurring, and may involve identifying *contingency measures* that can be brought into the situation if required. For example:

- » *First example:* Suppose you need two months to train for the marathon. But you have a wide network of Family & Friends, and in any two month period it is likely that something will happen that will disturb your training schedule. So you might *allow* two and a half months for your training, half a month more than the bare minimum you need, and then if such a disturbance occurs you can adjust without difficulty.
- » *Second example:* Suppose your marathon is to be run at a higher altitude than you are used to. You have conflicting information about how long you will need to be exercising at that altitude before

the marathon. Some say not at all, some say a week. But a week will blow out your accommodation and food costs. So you aim for a bit more *contingency* cash, keep researching the issue, and have in mind you may go a few days early if that seems to be the best advice.

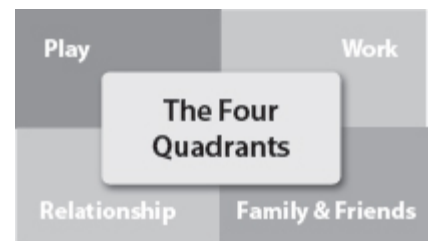
In both examples you are trading off the likelihood of the setback occurring against the additional time and resources that the setback would require.

It is, of course, possible that the nature and/or timing of the setback simply means you need to rethink, or at least reschedule achievement of your Goal. For example, if you incur a personal injury that will mean a three-week interruption in your training schedule, then you might decide to aim for completing a marathon at a later time.

But often the nature of the setback is such that you can work around it, particularly where you have already made an allowance that you can draw on, or have a contingency plan that you can put into action. You can think ahead to additional resources, such as money, medicine, transport, insurance and security that might need to be organized should they be required.

ACTION PLANNING GOALS FROM THE 4 LIFE QUADRANTS

Now that we've had a look at the six key ingredients of an effective Action Plan lets start Action Planning in each of the 4 Life Quadrants.



PLAY GOALS – AND ACTION PLANNING

Firstly, let's think about Play. Have a look at the Goal you've identified in your life for Play. Having selected that Goal, you can now develop an Action Plan to achieve that Goal.

Below is an example Action Plan. I have chosen my Stretch Goal of climbing the '3Ks', and have added in the strategies, resources, timelines, support networks and setback plans that I've selected.

ACTION PLAN: PLAY – DR PETE						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play	<i>Climb the 3 "K" mountains this year.</i>	<ul style="list-style-type: none"> • <i>Fitness: start weekly training program.</i> • <i>Research – best seasons to go and local guides.</i> • <i>Recruit – friends to come along and share the experience.</i> 	<ul style="list-style-type: none"> • <i>Money – total budget \$30k.</i> • <i>Time – book leave from work.</i> • <i>Check travel, visa and health insurances.</i> 	<ul style="list-style-type: none"> • <i>12 months: Kosciusko in Feb, Kilimanjaro in May, Kinabalu in Oct.</i> • <i>Due dates for visas, injections.</i> 	<ul style="list-style-type: none"> • <i>Friends to train and go on adventures.</i> • <i>Professional guides for mountains.</i> • <i>Travel agent for booking and permits.</i> • <i>Mentors who know training and preparation.</i> 	<ul style="list-style-type: none"> • <i>Have travel insurance.</i> • <i>Medications for altitude sickness/ acclimatize.</i> • <i>Injuries – avoid high risk sports prior.</i> • <i>Money – have spare available if needed.</i>

What Play Goal are you going to focus on? And what Action Planning steps are you going to need to take?

ACTION PLAN: PLAY – ME						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play						

HOW ARE YOU GOING WITH YOUR FIRST ACTION PLAN?

REMEMBER...

- » Action Planning is where all the detail occurs.

- » It can be exciting, and it can be frustrating.
- » I can tell you right now that as a life coach working with clients who are Action Planning, this is the point where some are tempted to give up, or decide to come back to it later, or decide that there are certain bits of the puzzle they don't fully understand, so they just put it aside for a while. Don't do that! Keep at it!
- » A "first draft" Action Plan will still get you on the way. Start with that if you need to, and then come back and make a second draft. Later in this chapter there are a few techniques to help you do this.
- » If there are bits and pieces that still need to be developed in your Action Plan make a note of that. Tell a friend. Be accountable.
- » But make sure you finish off that Action Plan for each of your 4 Life Quadrants, and then start putting it into practice – start doing it.
- » A detailed Action Plan for each of your 4 Life Quadrant areas is a basis to live a more fulfilling life across all four areas of *your* life.

WORK GOALS – AND ACTION PLANNING

What Work Goal are you going to focus on? And what Action Planning steps are you going to need to take?

The example below is a Stretch Goal for me. You can see the strategies, resources, timelines, support networks and setback plans that I've had to develop in order to Action Plan achieving this Stretch Goal in my work life.

ACTION PLAN: WORK – DR PETE						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
2. Work	<i>To become a Partner in the Company this year.</i>	<ul style="list-style-type: none"> •Attend 95% of network meetings. •Bring in 2 new jobs each month. •Complete KPIs as determined by Line Manager. •Get promoted to Senior Associate. 	<ul style="list-style-type: none"> •Manage Time. •Manage Diary. •Industry updates. •Referrer details. •KPI work plan. 	<ul style="list-style-type: none"> •Assess progress monthly. •Complete KPIs within 6 months. •Next promotion in 12 months. 	<ul style="list-style-type: none"> •Talk to friends about how to succeed at work. •Use mentors in the company to grow business. •Professional coach to refine skills and business acumen. 	<ul style="list-style-type: none"> •Delays in promotion – manage any setbacks by debriefing with mentors and professional coach. •Setbacks in growing business – use supports as per the above.

What Work Goal are you focusing on? And what are the Action Planning steps you will take?

ACTION PLAN: WORK – ME						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
2. Work						

RELATIONSHIP GOALS – AND ACTION PLANNING

What Relationship Goal are you going to focus on? And what Action Planning steps are you going to need to take?

As you can see, the Goal I selected was to begin dating again this year. And you can see the strategies, resources, and timelines, support networks and setback plans that I’ve developed to Action Plan my Goal in the Relationship Quadrant.

ACTION PLAN: RELATIONSHIP – DR PETE						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
3. R’ship	<i>Begin dating again this year.</i>	<ul style="list-style-type: none"> • Seek advice from 5 friends on dating. • Sign up to a dating website. • Go on 3 coffee dates. 	<ul style="list-style-type: none"> • Time. • Internet. • \$50 for dates. 	<ul style="list-style-type: none"> • 2 weeks (advice from friends). • 1 week (dating website). • 1 month (3 coffee dates). 	<ul style="list-style-type: none"> • Talk to friends about their experiences to help meet the right people. • Life coach to review strengths and weaknesses and give feedback. 	<ul style="list-style-type: none"> • Not meeting the right people – keep persevering. Seek support from friends, adjust strategy and approach with life coach.

What Relationship Goal are you focusing on? And what are the Action Planning steps you need to take?

ACTION PLAN: RELATIONSHIP – ME						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
3. R'ship						

FAMILY & FRIENDS GOALS – AND ACTION PLANNING

What Family & Friends Goal are you going to focus on? And what Action Planning steps are you going to need to take?

I've selected the Goal of going camping with my family during school vacation at least once per year, including this year. You can see the strategies, resources, timelines, support networks and setback plans I've developed to achieve this Goal.

ACTION PLAN: FAMILY & FRIENDS – DR PETE						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
4. Family & Friends	<i>Go camping with my family during school vacations at least once per year, including this year.</i>	<ul style="list-style-type: none"> • <i>Talk to friends and organize a date for camping in the school holidays.</i> • <i>Pre-book date.</i> • <i>Book camping site.</i> 	<ul style="list-style-type: none"> • <i>Time.</i> • <i>Diary.</i> • <i>Camping equipment</i> • <i>\$200 for weekend.</i> 	<ul style="list-style-type: none"> • <i>1 week (talk to friends).</i> • <i>1 week (pre-book dates).</i> • <i>2 weeks (book camping site).</i> • <i>1 month before trip (check camping equipment).</i> 	<ul style="list-style-type: none"> • <i>Friends to go camping with (organize for several families) to join the trip.</i> 	<ul style="list-style-type: none"> • <i>Scheduling doesn't work and friends can't make it – organize several families.</i> • <i>Wet weather weekend – have wet weather gear and have another back-up date later in the year in case of cancellation.</i>

What Family & Friends Goal did you select? And what are the Action Planning steps you need to take?

ACTION PLAN: FAMILY & FRIENDS – ME						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
4. Family & Friends						

ACTION PLANNING: DEBRIEF AND REVIEW

As a first step in debriefing and review let's consolidate our Action Plans into one document. You can see on the next page how I have done this.

CONSOLIDATED ACTION PLANS – DR PETE						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play	<i>Climb the 'K' Mountains across the World (S)</i>	<ul style="list-style-type: none"> • <i>Fitness – start weekly training program.</i> • <i>Research – best seasons to go and local guides.</i> • <i>Recruit – friends to come along and share the experience.</i> 	<ul style="list-style-type: none"> • <i>Money – Total budget \$30K.</i> • <i>Time – Book leave from work.</i> • <i>Check travel, visa and health insurances.</i> 	<ul style="list-style-type: none"> • <i>12 months: Kosciusko in Feb; Kilimanjaro in May; Kinabalu in Oct.</i> • <i>Due dates for visas, injections.</i> 	<ul style="list-style-type: none"> • <i>Friends to train and go on adventures.</i> • <i>Professional guides for mountains.</i> • <i>Travel agent for booking & permit.</i> • <i>Mentors who know training and preparation.</i> 	<ul style="list-style-type: none"> • <i>Have travel insurance.</i> • <i>Medications for altitude sickness / acclimatize.</i> • <i>Injuries – Avoid high risk sports prior.</i> • <i>Money – have spare available if needed.</i>

2. Work	<i>Become a Partner in the Company (S)</i>	<ul style="list-style-type: none"> • Attend 95% of network meetings. • Bring in 2 new jobs each month. • Complete KPIs determined by Line Mgr. • Get promoted to Senior Associate. 	<ul style="list-style-type: none"> • Manage Time. • Manage Diary. • Industry updates. • Referrer details. • KPI work plan. 	<ul style="list-style-type: none"> • Assess progress monthly. • Complete KPIs within 6 months. • Next promotion in 12 months. 	<ul style="list-style-type: none"> • Talk to friends about how to succeed at work. • Use mentors in the company to grow business. • Professional coach to refine skills and business acumen. 	<ul style="list-style-type: none"> • Delays in promotion – manage any setbacks by debriefing with mentors and professional coach. • Setbacks in growing business – use supports as per the above.
3. R'ship	<i>Begin dating again this year.</i>	<ul style="list-style-type: none"> • Seek advice from 5 friends on dating. • Sign up to a dating website. • Go on 3 coffee dates. 	<ul style="list-style-type: none"> • Time. • Internet. • \$50 for dates. 	<ul style="list-style-type: none"> • 2 weeks (advice from friends). • 1 week (dating website). • 1 month (3 coffee dates) 	<ul style="list-style-type: none"> • Talk to friends about their experiences to help meet the right people. • Life coach to review strengths and weaknesses and give feedback. 	<ul style="list-style-type: none"> • Not meeting the right people – keep persevering. Seek support from friends, adjust strategy and approach with life coach.
4. Family & Friends	<i>Go camping with my family during school vacations at least once per year, including this year</i>	<ul style="list-style-type: none"> • Talk to friends and organize a date for camping in the school holidays. • Pre-book date. • Book camping 	<ul style="list-style-type: none"> • Time. • Diary. • Camping equipment • \$200 for weekend. 	<ul style="list-style-type: none"> • 1 week (talk to friends). • 1 week (pre-book dates). • 2 weeks (book camping site). • 1 month before trip 	<ul style="list-style-type: none"> • Friends to go camping with (organize for several families) to join the trip. 	<ul style="list-style-type: none"> • Scheduling doesn't work and friends can't make it – organize several families. • Wet weather weekend – have wet weather

		site.		(check camping equipment).		gear and have another back-up date later in the year in case of cancellation.
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Now it's your turn. Put your Action Plans into a consolidated table as per the above. You may find it easier to create a new document using the format below.

CONSOLIDATED ACTION PLANS – ME						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play						
2. Work						
3. R'ship						
4. Family & Friends						

A way to review your Action Plans is compare them. Is one better than another? Does this suggest aspects that you could improve? Consider:

- » Are your Goals specific enough? They probably are – not much to add here to what is in the previous chapter.
- » Have you listed all the strategies and steps involved?
- » Have you identified the resources you will need?
- » Have you established timelines, including any critical paths?
- » Have you developed the necessary support networks?

» Have you planned ahead for any setbacks?

By comparing your Action Plans you may well see some aspects to improve.

CROSS-CHECK

Have a look at your consolidated Action Plans and consider whether there are any awkward features. Are there areas or time periods where your Action Plans bump into each other? For example, when you look across your timelines, is there a reasonable spread of activities over the year (or other period as you may have selected)? Or is there, say, more than you can handle in, say, May, and not much in July – might there be scope to juggle things to obtain a better flow of the various activities?



On the other hand there may be areas, or periods of time, where you can cover off an aspect of one Action Plan at the same time as you deal with a step in a different Action Plan.

Congratulations!

*You are now on the way to achieving your Goals
and living your Life Dreams.*

Our next and final chapter is about staying motivated and celebrating your success.



PART THREE:

STAYING MOTIVATED & CELEBRATING SUCCESS!



STAYING MOTIVATED & CELEBRATING SUCCESS!

“A picture is worth a thousand words.” ~ Chinese Proverb

“Winners have parties, losers have meetings.” ~ Sam Chisholm

“Birds of a feather flock together.” ~ Plato

“As you grow, your associates will change. Your friends will stretch your vision or choke your dream. Those that don’t increase you will eventually decrease you.” ~ Colin Powell

Hey, congratulations! It’s all done now.

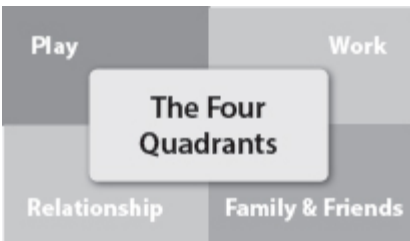
You’ve completed your Life Strategy map so that you can live your version of the Endless Summer. Well done!

A lot of work has been required to get all that detail of Action Planning done, some courage at times to set Goals and to really stretch out and identify your Life Dreams, and, of course, that initial stretch to stop and think about your Personal Legacy – what you leave behind when you are no longer here.

In this final chapter I want to share with you a few strategies I personally find really helpful in going the distance and enjoying the journey.

THE ENDLESS SUMMER SURFER

When we began this journey we identified the Endless Summer as the ideal world for surfers where they travel the world endlessly following the summer season with family and friends looking for the perfect waves. We discussed how this idea, beyond surfers, can apply to us all, and represents our Life Dreams.



In order to live our Life Dreams we have now developed a *Life Strategy* that includes our *Personal Legacy*, and we have a clearer understanding of our purpose and Legacy in life. Our *Life Dreams* are the vision for what our ideal life looks like across each of the 4 *Life Quadrants*. We have selected specific *Goals* for each of the four quadrants of our life. The detailed *Action Plans* we have developed will help us to achieve our Goals and live our Dreams. Those Action Plans include support networks and planning for setbacks.

I want to leave you with a few final reminders to keep you inspired and encouraged to “Go the Distance” and Enjoy the Journey.

THE 1 PAGE PLAN AND THE APP

Putting together a 1-page plan from the exercises you have completed in this book is a useful final step. I have attached mine, and a blank copy, in the Appendix. You can also download a printable pdf version at TheStressSurfer.com.

In addition, a Life Strategy Goals Tracker on *The Stress Surfer App* for iPhone and Android allows you to record your Goals and plans and track your progress – check it out.

STAYING MOTIVATED AND CELEBRATING SUCCESS: PART 1

A PICTURE IS WORTH A THOUSAND WORDS...

that amazing overseas holiday with my family, though it did take much planning and effort. And I have been able to reconnect and move on in my Relationship! The pictures of Life Dreams fulfilled are now beautiful reminders of such wonderful experiences that I can share with Family & Friends who have been on the journey with me!

STAYING MOTIVATED & CELEBRATING SUCCESS: PART 2

MENTORS AND ACCOUNTABILITY: BIRDS OF A FEATHER...

An old saying is that “birds of a feather flock together”, or, as another saying has it, “you become the company you keep”. So be accountable and surround yourself with positive friends and mentors who will stretch and grow you rather than limit you. Colin Powell puts it well in the quote at the start of this chapter.

HAVING THE RIGHT MENTORS AND FRIENDS TO HELP YOU STAY MOTIVATED

Finding mentors to help you is not always easy, and can take time. Sometimes we are lucky enough to have a family member or friend who is happy to take on the role, whether or not we ever ascribe them the “mentor” title. This can be very helpful in the various and varying challenges of adult life development. To pursue specific Goals in niche areas we may need to locate mentors who have specialist knowledge, skills and/or life experiences that relate to the Goals we are pursuing and the particular challenges we face. This is true in business, sports and some aspects of Life Strategy.

So how do I find these people and get them to be willing to share my journey? There is only one way: ASK!

Work out as best you can what type of challenges you face and what types of life experiences you would be able to learn from, and start asking people whom they recommend you talk to. Ask friends and family whom

they may know who could mentor you. Ask professional psychologists, counselors, consultants and coaches. Ask colleagues, supervisors and workmates. Ask, Ask, Ask! It can be a long road but if you ask good questions and persevere long enough you will find one or more mentors who can encourage you, push you and support you.

There are more people than you may realize willing to stop and assist you if you have the courage to ask, clarity on what you are seeking, and the flexibility to fit in with their available time. There is an even wider group available if you are prepared to invest money in joining related mentoring and peer support groups or paying for a professional coach or counselor to assist you. Regardless of whether they are paid professionals or generously volunteering their time, making vague or non-specific requests with inflexible timeframes is a sure-fire path to defeat and to missing the extra wisdom and support available to you.

When you have the right mentors, make sure you have regular check-ins with them, and perhaps with other friends, on your progress in each of the 4 Life Quadrants. Get a life coach if need be or a paid professional to help you here as well. It will be time well invested if it keeps you on track and living your Life Dreams.

FRIENDS AND MENTORS: CELEBRATING SUCCESS

The Endless Summer Life Strategy includes taking the time to celebrate success with your friends and mentors. Stop and “smell the roses”, or, as the Endless Summer surfer might say, “Chill to the thrill and rush of riding great waves, and to the thrill of celebrating with your friends.” No point being an over-achiever constantly scoring Goals if there’s no one to celebrate with. I like the saying: *Winners have parties; losers have meetings*. I take any opportunity I can to celebrate Goals that I, or my Family & Friends, achieve. But don’t let the partying get out of control to the extent that your wider Life Dreams and Personal Legacy could become compromised. “Friends” who lead you astray might be fun to be around in the short term can but end up becoming a negative influence as time goes on. Enjoy celebrating living the Endless Summer with party people you meet who share your values and sense of purpose.

ADAPTATION AND FLEXIBILITY: TWO STEPS FORWARD, ONE STEP BACK...

We need to be able to adjust our plans and Goals when needed whilst remaining true to our Dreams and Legacy. Most of us will have to deal at times with adversity in our lives – things going wrong, things not working out. *If* this happens, or more likely *when* it happens, adjust your plans and Goals while staying true to your Dreams and Legacy.

Plans and Goals are *how* we fulfill our *what* – our Personal Legacy and our Life Dreams. The *what* is more fundamental to who we are than the *how*. For example, after a few weeks of working on implementing your Action Plans, you find that four Stretch Goals – one for each of your Life Quadrants – is too much for you at this time. So, OK, prune back one or two of your Goals. Use your first set of Action Plans to learn about how you make such plans work for you. Then try adding more stretch to your Goals next time when you review your results and reset your Action Plans.

Some of us may have problems with unexpected opportunity. For example, we might find we have sudden wealth, perhaps by obtaining an inheritance, or winning the lottery, or some other great opportunity, and lose track of fulfilling our Personal Legacy and Life Dreams. Our Action Plans are left in the dust and we end up in an unsatisfying and unfulfilling space. An unexpected opportunity certainly might be a catalyst to revise your Action Plans, but does the new opportunity really affect your Personal Legacy or your Life Dreams? Be prepared to adapt, whether to adversity or to opportunity, while staying true to who you are.

REVIEW YOUR PROGRESS: KEEP YOUR PLANS RELEVANT

Personal Legacy and Life Dreams: Your Personal Legacy and your Life Dreams should be good for some time – perhaps a year, or two or three years, or more? However, as you implement your *initial* Action Plans you might think of some improvements to the way you express your Personal Legacy or your Life Dreams. And over time, just because your life has moved on, and you have more and wider experience, you might see your Personal Legacy and/or your Life Dreams more clearly.

Goals and Action Plans: Your Goals and Action Plans are another matter. They are about *how*, and need to be rethought and redone from time to time. Your Goals might be good for a year or so, or whatever time-bound factor you build in, but by then either you have done it or you have not, so you review what you have achieved and draw on that learning to set a fresh Goal.

You should monitor and review your Action Plans more frequently. Mostly you will find some things go quicker, and some things go slower, than the schedule in your Action Plan. So you can learn from that and fine-tune your Action Plan. You will gradually get your own rhythm per Action Plan of how often it is worthwhile doing so. For starters, if your Action Plan is for, say, 12 months, then maybe fine-tune it after every three months; that also will alert you if more than fine-tuning is needed.

The writer, Norman Cousins said:

“The great tragedy is not death, it’s what we allow to die while we live. When you are on your deathbed you are not thinking about how much money you made or how much you have accomplished. The questions most people generally ask on their deathbeds are: 1. Have I lived Wisely? 2. Have I loved Well? 3. Have I served Greatly?”

So there you have it!

Stay motivated and celebrate success!

Live your Endless Summer Life Strategy by being true to your Life Strategy so that, in fact, you find that you live your Life Dreams and leave your Personal Legacy!

Ride the Waves of Life!
Dr Pete



APPENDIX 1: CONSOLIDATED ACTION PLAN

Use the plans on the following pages to help develop your Endless Summer Life Strategy Plan, or download a printable pdf version from TheStressSurfer.com.



THE ENDLESS SUMMER LIFE STRATEGY PLAN



PART 1. THE BIG PICTURE		
AREA & LEGACY	LIFE DREAMS	GOALS (S=STRETCH)
1. Play		
2. Work		
3. Relationship		
4. Friends & Family		

PART 2. MAKING IT HAPPEN!						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play						
2. Work						
3. Relationship						
4. Family & Friends						

THE ENDLESS SUMMER LIFE STRATEGY PLAN



PART 1. THE BIG PICTURE		
AREA & LEGACY	LIFE DREAMS	GOALS (S=STRETCH)
1. Play <i>He loved the outdoors and went on many great adventures.</i>	<i>To travel the world, climb mountains and surf the oceans with family and friends.</i>	<i>Several weeks in Europe with family. (S)</i> <i>Climb Mts Kilimanjaro, Kinabalu and Kosciusko in one year. (S)</i> <i>Complete Half Iron Man Triathlon. (S)</i> <i>Weekend surf trips with family.</i>
2. Work <i>He was inspiring and challenged people to be their best.</i>	<i>To be a part of an enduring company that helps others.</i>	<i>Join a company with aligned values.</i> <i>Help build and grow the business.</i> <i>Become a partner or owner. (S)</i>
3. Relationship <i>He loved his partner completely and passionately.</i>	<i>Be in a wonderful loving relationship for the rest of my life.</i>	<i>Learn from past and profile my strengths and weaknesses.</i> <i>Begin dating again.</i> <i>Practice good boundaries and communication.</i>
4. Friends & Family <i>He was generous, supportive and available.</i>	<i>Be a super cool dad to my children and have great adventure buddies and close family ties.</i>	<i>Go camping with my family during school vacations.</i> <i>Build a network of 5-7 close friends with outdoor interests.</i> <i>Weekly dinners with extended family.</i>

PART 2. MAKING IT HAPPEN!						
LIFE QUADRANT	SPECIFIC GOALS	STRATEGIES	RESOURCES	TIMELINE	SUPPORT NETWORKS	SETBACK PLANS
1. Play	Climb the 'K' Mountains across the World (S)	<ul style="list-style-type: none"> Fitness – start weekly training program. Research – best seasons to go and local guides. Recruit – friends to come along and share the experience. 	<ul style="list-style-type: none"> Money – Total budget \$300k. Time – Book leave from work. Check travel, visa and health insurances. 	<ul style="list-style-type: none"> 12 months: Kosciusko in Feb; Kilimanjaro in May; Kinabalu in Oct. Due dates for visas, injections. 	<ul style="list-style-type: none"> Friends to train and go on adventures. Professional Guides for mountains. Travel agent for booking & permit. Mentors who know training and preparation 	<ul style="list-style-type: none"> Have travel insurance. Medications for altitude sickness / acclimatize. Injuries – Avoid high risk sports prior. Money – have spare available if needed
2. Work	Become a Partner in the Company (S)	<ul style="list-style-type: none"> Attend 95% of network meetings. Bring in 2 new jobs each month. Complete NPIs determined by Line Mgr. Get promoted to Senior Associate. 	<ul style="list-style-type: none"> Manage Time. Manage Diary. Industry updates. Referrer details. NPI work plan. 	<ul style="list-style-type: none"> Assess progress monthly. Complete NPIs within 6 months. Next promotion in 12 months. 	<ul style="list-style-type: none"> Talk to friends about how to succeed at work. Use mentors in the company to grow business. Professional coach to refine skills and business acumen. 	<ul style="list-style-type: none"> Delays in promotion – manage any setbacks by debriefing with mentors and professional coach. Setbacks in growing business – use supports as per the above.
3. Relationship	Begin dating again	<ul style="list-style-type: none"> Seek advice from 5 friends on dating. Sign up to a dating website. Go on 3 coffee dates. 	<ul style="list-style-type: none"> Time. Internet. \$50 for dates. 	<ul style="list-style-type: none"> 2 weeks (advice). 1 week (dating website). 1 month (3 coffee dates) 	<ul style="list-style-type: none"> Talk to friends about their experiences to help meet the right people. Life coach to review strengths and weaknesses and give feedback. 	<ul style="list-style-type: none"> Not meeting the right people – keep persevering and seek support from friends and adjust strategy and approach with life coach.
4. Family & Friends	Go camping with my family during school vacations	<ul style="list-style-type: none"> Talk to friends and organize a date for camping in the school holidays. Pre-book date. Book camping site. 	<ul style="list-style-type: none"> Time. Diary. Camping equipment. \$200 for weekend. 	<ul style="list-style-type: none"> 1 week (talk to friends). 1 week (pre-book dates). 2 weeks (book camping site). 1 month before trip (check camping equipment). 	<ul style="list-style-type: none"> Friends to go camping with (organize for several families) to join the trip. 	<ul style="list-style-type: none"> Scheduling doesn't work and friends can't make it – organize several families. Wet weather weekend – have wet weather gear, back-up date later in the year in case of cancellation.

ALSO FROM THE STRESS SURFER



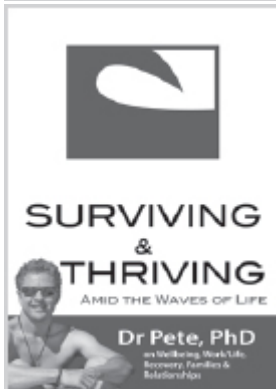
BETTER MAN: 5 LIFE LESSONS

Dr Pete shares his journey through mid-life, in particular 5 important Life Lessons he learned the hard way. Contains a “First Aid Kit” of 15 helpful insights to help manage the turmoil of mid-life and find greater clarity, direction and happiness on the next stage of your journey.



THE 7 TSUNAMIS OF MID-LIFE

Did you know the most dangerous period of mid-life is between the ages of 43–53, during which 7 of the 10 biggest Waves of Life can strike? Dr Pete provides a quick and easy-to-understand summary of essential survival skills that we can use immediately for each of The 7 Mid-Life Tsunamis.

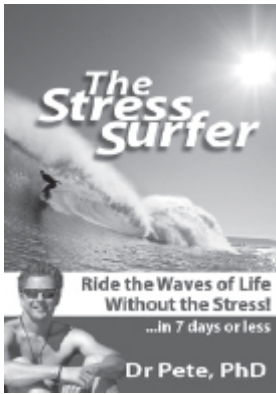


SURVIVING & THRIVING AMID THE WAVES OF LIFE!

Whether it’s the Regular Waves of Daily Hassles, the Big Waves of Major Change, or the Tsunamis of major life events, the waves of life just keep rolling in. Thirty great articles from Dr Pete on Wellbeing, Work & Life, Recovery, Families & Relationships.

RIDE THE WAVES OF LIFE WITHOUT THE STRESS!

The Book that started it all! Do you feel like every time a Wave of Life hits, you get crushed in a huge Wipeout of stress? Dr Pete shows you how to ride the Waves of



Life, avoid the stress Wipeouts, balance the 4 Elements of your Inner Wellbeing & live the Endless Summer!



OUR MISSION:

“To Provide Effective and Easy to Understand Wellbeing & Life Strategies so you can Successfully Ride the Waves of Mid-Life!”

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