

# My 2018 Plan

A workbook to visualize and execute a profoundly impactful year

*Special Note: The Adobe Forms functions will not work if you try to fill this out from a browser. Please first save it to a file location, close the browser, then reopen from the file location. If you do not have Adobe Reader, and your system forces you to use a browser for viewing, all features may not work properly in this form. Thanks.*

# Contents

Introduction	3
Core Values Assessment	4
Career Wheel	6
Executive Presence Assessment	7
Future You Worksheet	9
Thought Tuning™	10
Growth Initiatives Tracker	11

Many plans are in a man's heart, but  
the counsel of the Lord will stand.

# Introduction

Enclosed are a few simple yet powerful tools to aid you on your journey to a successful, righteous and fruitful year. As Christians, we know that God's purpose will ultimately prevail. That doesn't mean, of course, that planning is useless. It is, instead, indispensable, since it gives us a vision of the specific way forward. Plans will change, the outcome will remain.

“In preparing for battle I have always found that plans are useless, but planning is indispensable.”  
- Dwight D. Eisenhower

Here are the steps contained in this workbook:

- Step 1** – Core Values Assessment
- Step 2** – Career Wheel and/or Executive Presence Self-Assessment
- Step 3** – Future You Visualization
- Step 4** – Thought Tuning™
- Step 5** – Milestone Tracking Tool

This process binds together the truth of your inner self to a clarity of vision for what you want to become this year. I am including a simple project tracker tool you can download for use in creating projects, milestones and tasks.





# Core Values Assessment

Review the values list below. (There are two blanks at the bottom to add your own). Check the box next to all value words very important to you, including any you may have added. You can put as many checks as you like. The words that really connect with you are the ones you want to select. Let this be intuitive, taking no longer than ten minutes to complete.

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Accomplishment         | <input type="checkbox"/> Flexibility     | <input type="checkbox"/> Privacy          |
| <input type="checkbox"/> Absence of Pain        | <input type="checkbox"/> Freedom         | <input type="checkbox"/> Professionalism  |
| <input type="checkbox"/> Abundance              | <input type="checkbox"/> Friendship      | <input type="checkbox"/> Recognition      |
| <input type="checkbox"/> Achievement            | <input type="checkbox"/> Fulfillment     | <input type="checkbox"/> Respect          |
| <input type="checkbox"/> Adventure              | <input type="checkbox"/> Fun             | <input type="checkbox"/> Romance          |
| <input type="checkbox"/> Altruism               | <input type="checkbox"/> Holistic Living | <input type="checkbox"/> Safety           |
| <input type="checkbox"/> Appearance/Beauty      | <input type="checkbox"/> Honesty         | <input type="checkbox"/> Security         |
| <input type="checkbox"/> Autonomy               | <input type="checkbox"/> Humor           | <input type="checkbox"/> Self-Care        |
| <input type="checkbox"/> Avoidance of Conflict  | <input type="checkbox"/> Integrity       | <input type="checkbox"/> Self-Expression  |
| <input type="checkbox"/> Clarity                | <input type="checkbox"/> Intimacy        | <input type="checkbox"/> Self-Mastery     |
| <input type="checkbox"/> Commitment             | <input type="checkbox"/> Joy             | <input type="checkbox"/> Self-Protection  |
| <input type="checkbox"/> Communication          | <input type="checkbox"/> Leadership      | <input type="checkbox"/> Self-Realization |
| <input type="checkbox"/> Community              | <input type="checkbox"/> Loyalty         | <input type="checkbox"/> Sensuality       |
| <input type="checkbox"/> Connecting with Others | <input type="checkbox"/> Love            | <input type="checkbox"/> Service          |
| <input type="checkbox"/> Creativity             | <input type="checkbox"/> Nature          | <input type="checkbox"/> Spirituality     |
| <input type="checkbox"/> Emotional Health       | <input type="checkbox"/> Openness        | <input type="checkbox"/> Trust            |
| <input type="checkbox"/> Environment            | <input type="checkbox"/> Orderliness     | <input type="checkbox"/> Truth            |
| <input type="checkbox"/> Excellence             | <input type="checkbox"/> Personal Growth | <input type="checkbox"/> Vitality         |
| <input type="checkbox"/> Family                 | <input type="checkbox"/> Partnership     | <input type="checkbox"/> Professionalism  |
| <input type="checkbox"/> Fame                   | <input type="checkbox"/> Power           | <input type="checkbox"/> _____            |
|   |  | <input type="checkbox"/> _____            |

# Core Values Assessment *(cont'd)*

Next, narrow your choices from the above list down to your top eight core values by typing the value words into the boxes provided below.

Depending on how many you previously selected, this will take just a few minutes to complete.

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Finally, choose from the list of eight above your top five core values and enter them here – these are your Five Core Values:

Core Value #1

Core Value #2

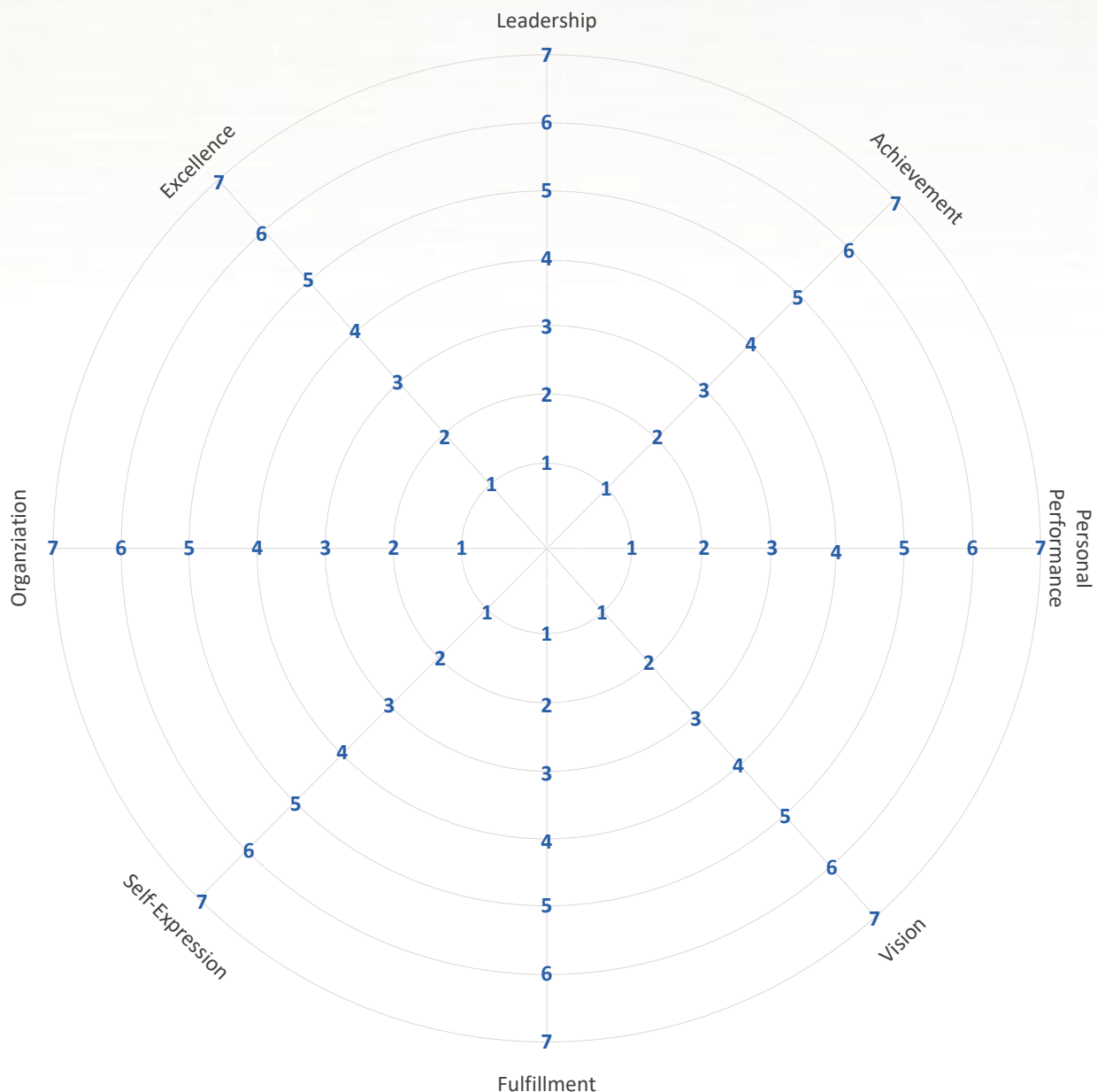
Core Value #3

Core Value #4

Core Value #5

# Career Wheel

The purpose of the wheel is to help identify an area or two in which to focus. For each category, rate your personal standing on a 1 to 7 scale. If the category is happening exactly the way you like, rate it a seven. If it is not, rate it based on your current situation. In order to depict your rating in the diagram, click the number in each category.



# Executive Presence Assessment

The purpose of this assessment is to help identify which executive presence dimension requires effort and attention. Rate yourself on a scale from 1 to 5 for each dimension below. Entering 1 means you score very low, 5 means you score very high. Enter numbers directly into the form. Subtotals will calculate automatically at the end.

## Physical Presence, Poise

### Rating

I am confident in group settings even when other tensions are present

\_\_\_\_\_

I am able to offer opinions, professionally and respectfully, even when unpopular

\_\_\_\_\_

I tend to attract positive attention at business or social events

\_\_\_\_\_

I am viewed as a person who manages change well, without complaint

\_\_\_\_\_

I am perceived as a leader

\_\_\_\_\_

People see me as self-controlled and relaxed

\_\_\_\_\_

I have a professional and neat appearance

\_\_\_\_\_

## People Sense

### Rating

I acknowledge and validate what others are feeling even when I disagree

\_\_\_\_\_

I am known for showing compassion and kindness

\_\_\_\_\_

I am able to quickly build trust with colleagues and subordinates

\_\_\_\_\_

Most people tend to find me approachable

\_\_\_\_\_

I respond differently to different people based on situation and context

\_\_\_\_\_

I am often told I am a good listener

\_\_\_\_\_

I am considered a team player and work well even in diverse groups

\_\_\_\_\_

I tend to make people feel more energized after a discussion

\_\_\_\_\_

# Executive Presence Assessment

## Business Intelligence

## Rating

- I am able to explain complex business ideas in simple terms \_\_\_\_\_
- I am not defined by my organization and hold larger interests \_\_\_\_\_
- I have industry-wide knowledge and expertise \_\_\_\_\_
- I convey well-rounded knowledge about industry leaders/competition \_\_\_\_\_
- I have a broad view of the world and converse on a wide range of topics \_\_\_\_\_
- I am viewed as having strong business knowledge \_\_\_\_\_
- I am able to speak specifically and confidently about industry trends \_\_\_\_\_

## Communication Skill

## Rating

- People understand my line of thought and see me as a critical thinker \_\_\_\_\_
- I feel at ease communicating with people I've just met \_\_\_\_\_
- I have you been told I add value to discussions by the quality of my comments \_\_\_\_\_
- When I speak, people tend to stop and listen \_\_\_\_\_
- I am often asked to speak before company or civic groups \_\_\_\_\_
- I am able to tell the story in a compelling way without being self-righteous \_\_\_\_\_
- I use words that are positive and authoritative instead of negative and weak \_\_\_\_\_
- I take the time needed to prepare and practice before a speech \_\_\_\_\_

If you scored >25, this is a strength. If 13-24, this could use intentional personal focus. If <12, this might require outside assistance.

**Physical Presence, Poise**

**Business Intelligence**

**People Sense**

**Communication Skill**

**My 2018 Plan**



*Look straight ahead, and fix your eyes on what lies before you. Mark out a straight path for your feet; stay on the safe path. Don't get sidetracked; keep your feet from following evil.*

# Future You

One of the most important aspects of growth and achievement is setting intentions. It means to have in mind a purpose or plan, to aim the mind. It's important to fix our eyes on that intention. Below, write out your intention for this year, as you deeply desire it to be. Imagine your ideal experience has happened and you are describing it to someone on New Year's Eve. Reference this frequently. Your mind will follow the path you set for it.

- What does your career look like at this end of this year?
- Where has it taken you and who is around you?
- Where are you enjoying it the most?
- What impact is it having in the lives of others?
- Where have you grown the most?
- Where has God's prosperity been most evident?

# Thought Tuning™

This is a cognitive restructuring technique that allows you to practice shifting the way you view your situation. It does take practice. As you learn it and master it, you will take hold of the promise in Romans 12:2. Ask yourself, then answer, each question when you realize you are “out of tune,” meaning you are feeling off. This process will help you connect your inner thoughts as the cause of your feelings.



What exactly am I feeling right now about this situation?



What am I telling myself about this situation that makes me feel this way?



When I feel this way, what actions do I usually take?

## ----- Recall Your Core Values -----



What is another way of thinking of this situation that's more in line with my core values?



When I tell myself this new thought, how does it make me feel?



When I feel this way, what growth opportunities emerge?



# Growth Initiatives Tracker

Once you have identified growth areas, written the Future You vision, completed the Core Values assessment and with the Thought Tuning™ process in hand, you can now identify the milestones for pursuing the goal. Here below is a snapshot view of the **Growth Initiatives Tracker** I developed and use to this day. It was too cumbersome to build as a template form, so I have it in Excel format. If you are interested in this tool, just email me by selecting the button below and I'll send you the Excel Template immediately.

Growth Initiative Name	Description	Stakeholders	Action Priorities	Due Date	Status
Region VP	Pursue advancement to the Region VP role with an offer in hand by the end of the year	Joe Smith, CSO Tina Lewis, Sr VP Sheri Meyers, Sr. VP	Create detailed business case	03/25/18	On Track
			Set Meeting with Sr VP's	04/15/18	On Track
			Gain recommendation from 2 RVP's	05/01/18	On Track
			Present Business Case to Sr VP's	06/01/18	On Track
			Obtain Offer Letter	08/01/18	On Track



It's hard to hit what we aren't aiming for. The Growth Initiatives Tracker is a way of enforcing the visualization tool (Future You) in order to reduce the risk of not reaching your ambitions.

The example above is meant to show you how simple it can be to create a plan. As you will notice, the Action Priorities are written as SMART Goals.

The more specific, the less the risk. If you are interested in this tool, select the button below to email me and I'll send it right away. Thanks.

[EMAIL SHAWN](#)



Make this the best year of your life. Devote your ambition, motives, action and outcomes to God.

With a desire to glorify Him above all else, we can set our minds on things above, confidently approaching the throne of God for his grace to be our best. And when we do, we can let the light of Christ shine bright in the marketplace.

*Psalm 115:1*

*Not to us, O Lord, not to us but to your name be the glory because of your love and faithfulness.*