



Self-Leadership Strategy Template: (Name /Year)

A Whole Being Approach to Planning for the Year Ahead

Overview:

Welcome! The purpose of this template is to provide you with an opportunity to become intentional about the year ahead, to tap into what you'd truly like to create in your work and your life, and to help you recognize the important connections between all of the various aspects of your life. After all, we have a better chance of succeeding in one area when we are looking after the others as well.

A key component of your Self-Leadership Strategy is to invite you to focus on what you aspire towards and not just what you want less of / to avoid. When you consistently consider your wants, dreams and needs, you can discover the motivation to step out of your comfort zone and make the sometimes tough decisions that better align with who you really are and what's truly possible for you.

By taking the time to create a bigger picture for the year ahead and a strategy for all aspects of your life, you will find you are better supported throughout the year. When the tension rises at key moments, you'll be supported by this vision and less tempted to make rash decisions that only temporarily relieve your stress. You'll be better able to put these moments into perspective and move forward with more clarity and confidence about the choices you're making.

Throughout the year, it's important to stay open to what emerges over time. Know that your objectives and perspectives may evolve in the next twelve months – make any adjustments as necessary however don't throw out the strategy altogether as things change!

(Please contact me directly if you'd like the editable, Word version instead: md@processbasedliving.com | 416.988.5115)

Instructions:

1. **MAKE TIME TO WORK ON YOUR STRATEGY:** Start by scheduling time in your calendar to work on your self-leadership strategy for the year ahead. The objective is **not** to complete it in one go, but rather to get your mind thinking about the different aspects of your life and what you want for them. Two to three hours per week for a month is a reasonable approach that can stimulate and support your creative process throughout this exercise (and creativity is needed to dream about your future!).
2. **DESIRED FUTURE:** Begin by considering your Desired Future first, for each aspect of your life. Dream as big as you can here. Make sure you think about the **quality of the experience** you want to have in addition to what you want to achieve. Connect with your head and your heart to ensure that your Desired Future is truly meaningful to you, and therefore motivating.
3. **CURRENT REALITY:** Then consider your Current Reality, both what is positive / working well, along with what is less satisfying and that you'd like to change.
4. **WHAT'S NEEDED:** Next, identify what is needed to help you move from your Current Reality to your Desired Future in the next year. Be specific about the mindsets that can support you as well as actionable objectives. Share your strategy with a trusted friend or partner.
5. **REVISIT YOUR STRATEGY REGULARLY:** Schedule time each month (1-2 hours) to review your strategy and update it as needed, and as various aspects evolve over time. Consult with your trusted friend/partner if you find yourself getting stuck on certain objectives – seek new perspectives to help you see your situation more clearly and in different lights.

***Note** – Work is listed first in the table below because it tends to be the easiest area for getting started in thinking about your current reality and desired future (your desired “spirit” can be a little harder to name right off the bat!). However, it is recommended that you fill out each row and then re-order them according to the priority that makes the most sense for you.

Self-Leadership Strategy: (Name /Year)

Aspects of Self	(2) Current Reality: What is here now? How do I think & feel about it? Where am I in relation to my desired future?	(3) What's needed to get from my current reality to my desired future	(1) Desired Future: What is the work I dream of doing? What is the life I dream of living? What do I want, what do I need? What are my goals?	
			Near Future (1 – 3 years)	Farther Out (> 3 years)
CONSIDERATIONS:	<i>Consider: what's positive / working well, in addition to what is less satisfying</i>	<i>Identify supportive mindsets and actionable objectives for the year ahead</i>	<i>Consider: what is the quality of experience that you'd like to have, in addition to what you want to achieve</i>	<i>Consider: what is the quality of experience that you'd like to have, in addition to what you want to achieve</i>
My work				
My business (if applicable)				
My career				

Aspects of Self	(2) Current Reality: What is here now? How do I think & feel about it? Where am I in relation to my desired future?	(3) What's needed to get from my current reality to my desired future	(1) Desired Future: What is the work I dream of doing? What is the life I dream of living? What do I want, what do I need? What are my goals?	
			Near Future (1 – 3 years)	Farther Out (> 3 years)
Personal Finances				
My intimate partnership				
My friends & community				

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			Near Future (1 – 3 years)	Farther Out (> 3 years)
My family				
My health – mental, physical				
My fun, play, adventure (creativity, learning, growth...)				

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			Near Future (1 – 3 years)	Farther Out (> 3 years)
My spirit				
Other?				

