

From Ideas to Actions

Instructions

Life Balance Action Plan Exercise

This exercise is useful for establishing a plan of action to achieve your goals that takes into account the priorities in all areas of your life. If too much emphasis is given to one area of your life without sufficient attention to other important areas this can result in feelings of imbalance, for example, work life imbalance.

This is a useful next step for defining your actions after identifying any life imbalances from completing the Wheel of Life exercise included in the Defining your Destination section

The exercise works on a cascade approach from identifying what you want to achieve in the year to the daily and weekly actions that need to be carried out to provide the desired results.

Note: Work can be included as an overall area of your life with a general commitment activity included, for example – daily - 8 hours. Alternatively, work roles can be broken down and included.

Step 1: Using a format to document this process that works for you:

- Identify the important areas of your life
- Establish the role or goal that you would like to achieve
- Identify the key activities (annually, quarterly, monthly, weekly, daily) that need to be performed during the year to achieve the goal or fulfil the role
- This provides a snapshot for activities that need to be completed for the year that will lead to you achieving the life balance you desire

Step 2: On a monthly basis, review the annual plan and progress to date, and create a monthly action plan with defined activities for each of the areas of life – include all the daily, weekly & monthly activities as well as any of the less frequent activities that fall into the current month (an example of the monthly activity plan is included in the appendix).

It is also useful to identify habits for maintenance and growth to ensure all monthly actions are included.

Step 3: On a weekly basis, review the monthly plan and progress to date, and create a weekly to do list, allocating activities to a specific day, taking into account any other commitments in your diary

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Monthly Plan Date:

Appendix

AREA: BUSINESS GOAL/ROLE: <i>Habits:</i> Actions:	AREA: SELF DEVELOPMENT/QUALIFICATIONS GOAL/ROLE: <i>Habits:</i> Actions:
AREA: FRIENDS/SOCIAL LIFE/HOBBIES GOAL/ROLE: <i>Habits:</i> Actions:	AREA: FAMILY/HOME GOAL/ROLE: <i>Habits:</i> Actions:
AREA: FINANCE GOAL/ROLE: <i>Habits:</i> Actions:	AREA: HEALTH/WELL-BEING GOAL/ROLE: <i>Habit:</i> Actions:
AREA: CHARITY GOAL/ROLE: <i>Habits:</i> Actions:	AREA: GOAL/ROLE: <i>Habits:</i> Actions: