

The Question

'Its five years from today and my entire life has gone according to plan. Every goal achieved, every obstacle overcome.

What does it look like?'

I firmly believe that this question is the key to a successful life. Read any of the new-age books on the market today like *The Secret* or *The Power of Intention* and they all cover a variation of this question.

I and my clients have found that a rolling five year vision is the best way to keep your eye on the ultimate prize without totally losing sight of the here and now. So, every year I ask myself *The Question*.

To help me answer *The Question* I developed the attached tool called *The Life Outline*.

It's made up of four sections that cover your business and personal goals. It forces you to take the time to think about the most important things in business and life, all within the context of a manageable five-year vision.

Remember, your business career is one part of your overall life and it's your life that counts. *The Life Outline* and *The Question* are designed to help you find the right work/life balance in order to achieve your goals.

The Life Outline

The purpose of this outline is to help you better focus on where you want and need to go five years in the future, both personally and professionally. This is for your eyes only and the sharing of any information is optional.

Think in terms of your life and business goals combined.

Initially allocate an hour or two of time for better idea flow.

When completing the **Personal** and **Business Vision** forms, think specifically with an eye toward your five year goals.

When completing the **Personal** and **Business Outline** forms, focus on each separately.

Once you've captured your initial 'rush' of thoughts, continue to take your time with this process. Keep the outline handy for a week or two, as ideas and thoughts will continue to flow and you will want to capture them.

Details are important as these **Key Result Areas** that will serve as the foundation of your **Future Scenario** and drive your **Tactical Plan**.

Upon completion, begin to prioritize the future business goals and overlay them on your future personal goals. This will help you reconcile the compromises you may have to make to successfully attain the lifestyle you desire while growing your company.

Once you've completed the outline, write a minimum 2 paragraph answer to the following question:

Personal Vision

Present

My favorite ways to spend time:

The most important people in my life:

**My greatest past learning experiences:
(physical, mental, spiritual, social)**

My greatest 'hits' and accomplishments:

My greatest challenges:

Personal Vision

Future

Someday I would like to:

People I want to know:

New learning experiences:
(physical, mental, spiritual, social)

Future accomplishments:

Future challenges:

Business Vision

Present Day

My role:

What I like about my role:

Key people/positions:

Most important learning experience:

Greatest accomplishments:

Business Vision Future

My role:

Things to change about my role:

Key people/positions:

New growth opportunities:

Future accomplishments:

Financial	Personal Outline	
Key Result Areas	Present	Future
Family	<ul style="list-style-type: none"> • — _____ • — _____ • — _____ 	<ul style="list-style-type: none"> • — _____ • — _____ • — _____
	<ul style="list-style-type: none"> • — _____ 	<ul style="list-style-type: none"> • — _____
Health	<ul style="list-style-type: none"> • — _____ • — _____ • — _____ • — _____ 	<ul style="list-style-type: none"> • — _____ • — _____ • — _____ • — _____
Spiritual	<ul style="list-style-type: none"> • — _____ • — _____ • — _____ • — _____ 	<ul style="list-style-type: none"> • — _____ • — _____ • — _____ • — _____

Examining	<ul style="list-style-type: none">• _____• —• _____• —• _____• —	<ul style="list-style-type: none">• _____• —• _____• —• _____• —
Recreation	<ul style="list-style-type: none">• _____• —• _____• —• _____• —	<ul style="list-style-type: none">• _____• —• _____• —• _____• —
Community	<ul style="list-style-type: none">• _____• —• _____• —• _____• —	<ul style="list-style-type: none">• _____• —• _____• —• _____• —

Examining	<ul style="list-style-type: none"> • _____ • — • _____ • — • _____ • — 	<ul style="list-style-type: none"> • _____ • — • _____ • — • _____ • —
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Business Outline

Key Result Areas	Present	Future
Growth (Company/ Personnel)	<ul style="list-style-type: none"> • _____ • — • _____ • — 	<ul style="list-style-type: none"> • _____ • — • _____ • —
	<ul style="list-style-type: none"> • _____ • — 	<ul style="list-style-type: none"> • _____ • —
Personnel	<ul style="list-style-type: none"> • _____ • — • _____ • — • _____ • — 	<ul style="list-style-type: none"> • _____ • — • _____ • — • _____ • —

Examining	<ul style="list-style-type: none">• _____• —• _____• —• _____• —	<ul style="list-style-type: none">• _____• —• _____• —• _____• —
Sales	<ul style="list-style-type: none">• _____• —• _____• —• _____• —	<ul style="list-style-type: none">• _____• —• _____• —• _____• —
Marketing	<ul style="list-style-type: none">• _____• —• _____• —• _____• —	<ul style="list-style-type: none">• _____• —• _____• —• _____• —

