

Workbook

Get Done What Matters Most



4 Weeks to Creating Balance in Your
Life and Business

Robin Goodbary MBA, MCC
Rightly Successful, LLC

Prologue

It's 3 PM Sunday afternoon and another weekend is ending. While the weekend was jammed packed, you feel rejuvenated and calm. You sit down for a moment and then it hits you. You've got countless unanswered emails, unanswered texts, and voicemails, a nearly completed report and the beginnings of a huge project on your desk on Friday.

Now it's your moment of reckoning, do you ...

1. Feel frustrated and anxious about "all that stuff I left to do Friday" So with a knot in your stomach and resentment brewing, you start answering emails and voicemails and jotting down notes on the report.

Or

2. Think wow "all that stuff I left on my desk Friday", and feel, "cool, I had a fantastic weekend so I'll get a head start on my week and start whittling away at the voice and emails" So you begin to jot down some thoughts on the report and respond to voice and emails.

Both outcomes are similar in that you are working on Monday morning's work at home, on the weekend. However, there are a couple of things very different about option two.

1. Even with working at home, your experience of work is positive versus the anxiety and resentment you might feel in option one. You are in control over how your weekend continues.
2. Most importantly, you consciously chose to work. You did not feel put upon or like that this is something you "have to do". You were good with it.

In option one YOU reacted to everything you left on Friday. In option two YOU consciously chose your response to everything you left behind on Friday.

You have a choice...

You have heard it said many times, no doubt. You (actually) do have a choice in how you live your life. You don't simply have to react to the circumstances around you. By living a "Rightly Successful Life" you can get done what matters most to you. You craft your life so that you decide. And your choice is based on your *Personal Action License*, your blueprint for life.

Put another way, it's about crafting a *life of your own design*. Most people don't wake up and say, "Hmm today, I'm going to design my life". Most of the world doesn't even acknowledge that they really can do something, anything different today from what they did yesterday.

TAKE THE QUIZ: REACT OR CHOOSE

1. Do you have reasons for your life not completely working out?
2. Do you at times feel frustrated and confused about your job or career?
3. Do you have just a few supportive relationships?
4. Are you troubled (even mildly) about where you are in your life?
5. Are you watching friends and family moving forward in their lives

If you answered yes to three or more then you may have chosen Life as a reaction your outcome is unknown. Beware, many who choose this road end up considering themselves a victim of life.

WHO IS YOUR LIFE DESIGNER?

You, no one, everyone anyone? Not making a choice is a passive way of making a choice. Does life feel like it happens to you. Now is the time to actively take control of your life and start creating it. What path do you choose?



“Life isn’t about finding yourself. Life is about creating yourself.”

George Bernard Shaw



I don’t mean to suggest that taking control of your life means you have any veto power over what happens and what does not in your life. What I mean is that you aim for 100% involvement in how you will respond to what happens to you.

You also get to focus your time and energy on those things that matter most to you, consequently bringing you more joy, peace and satisfaction with life. You get to have Your definition of “Personal Freedom”.

WHAT IS PERSONAL FREEDOM?

I started my business out of a passion to support others to design and live a life well loved. I actively and intentionally choose to believe that we are not victims of our circumstances nor the world around us.

Yet, sometimes making a change may not feel, sound, or look like much of an option. There is so much real or perceived “stuff” that can get between you getting done what matters most to you. For example, fear of failure, fear of alienating your loved ones, fear of not knowing what to do next, complacency, and family pressure are just a few. Then there is the perceived lack of time, money, know-how or education, etc. which may stand in the way of living out your own life.

Personal Freedom is living life from a place of calm, clarity, and choice. You experience it when you are living a life of intentional design. It provides you the peace of mind and confidence to make decisions, to face obstacles and adversity and to deal with life's situations and circumstances.

Who do you want to be in your life

- *What would living the life YOU designed mean for you?*
- *What would your life be like if you felt awesome about almost every interaction you had each day?*
- *What would your days be like if you absolutely loved your job?*
- *How is living the life YOU created working for you?*
- *What would your life be like if you lived this way every day?*
- *What would your days be like if you absolutely loved life?*

Let's start with a three-step process to supports you to get more engaged in your own life.

The Three Steps: An Overview

Step 1 Engage your Life

Become actively involved in you! This does not mean become self-absorbed or not concerned about others. It means you pay attention to your own life. You have been shaped and trained based on what others have wanted. In this step you consider the important roles, responsibilities, and activities and make choices about them.

Step 2 Create your Life

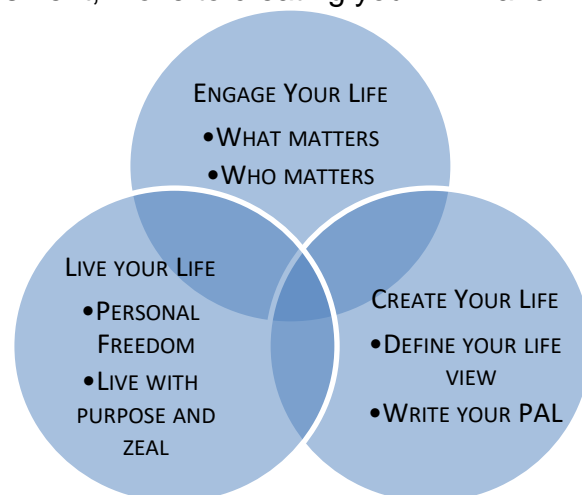
Define how you view life. I once heard someone say *“The first 40 years of my life my parents wrote on my life’s white board. These next 40 years, I’m writing on it”*. Draft your Personal Action License (PAL). Clearly lay out what areas of your life are important. Choose how you will live, engage, or interact with others and the world.

Step 3 Live your Life

Live out your Personal Action License with purpose and zeal. Get out into the world. Quietly be a role model and start living a Rightly Successful Life. After all, you created it to be your best you. Success is now defined by your own terms, freely.

These three steps to Getting Done What Matters most are sequential and iterative and overlap on each other. Understand that this is a process. It takes time. Expect to complete these steps over several weeks or months. Experience has shown that you begin with your assessment, move to creating your PAL and test drive it. You may revise your PAL all the while deepening your understanding and assessment of life which in turn may have you modify your PAL.

The most important takeaway is to HAVE FUN with this process!



Prepare Yourself: Get in the “right” frame of mind

The “Right” mindset depends on you. You know what it is best.

- Would listening to music help?
- Consider your optimal timing, weekday or weekend, morning, or night.
- Will you do this alone or with a friend or two?

As you are completing this workbook, assessing who and where you are in life, creating your Personal Action License and living out your PAL, be prepared to exercise candor, compassion, and creativity.

Candor

Be open, honest, and frank with and about yourself and your life. It all begins now; now you embark on your journey. You may have considered yourself candid in your dealings with others. Now is the time to step back and apply that same candor to yourself and your life.

Compassion

Be kind and gentle with yourself. These may seem like hard choices. Designing your life means you make decisions in those important areas of your life. This may mean that you no longer spend time with a toxic friend or coworker. This is a process so don't try to force it.

Creativity

Be imaginative and progressive in your approach to this process. You may reach points where you just don't know what to do next. This is an exciting point. You now get to do something different! Allow yourself to be surprised by new and unique approaches to old issues.

EXERCISING CANDOR:

Look at the conventions you hold and make an assessment. Did you CHOOSE them, or did you adopt them? Be open about the origin of your beliefs and honestly approach and challenge each of them. Apply it throughout this process.

EXERCISING COMPASSION:

Recognize that you did the best with what you knew at the time. You are starting fresh and are about to learn and to do different things. Take your time and don't try to rush this process. Approach your journey to getting done what matters most to you from many different perspectives. If something is not working, try another approach, try another time, try another place, or try another person. But don't give up.

EXERCISING CREATIVITY:

Talk to others, read, pray, meditate, journal, exercise, go a run or a walk, do something new that will help you transcend your currently held ideas, rules, or patterns. And, have fun with this! Keeping it light, keeps it going.

Step 1: Engage your Life

Our lives are made up of quite a few different roles, responsibilities, and activities. When you put all of them together, you have a whole and complete life.

In this step you will be looking at the roles you take on in your life, the responsibilities those roles carry in your life and what activities are associated with you taking on those roles. In a sense, you are looking at who you are, how you perceive the roles, and what you do and what you.

Consider your role as an employee or entrepreneur, family member, money manager, and friend. Think about your responsibilities to your romantic relationship, employer, family, finances, and your health. Take note of your recreational, political, religion, and spiritual activities. During this step you are assessing what means most to you and its relative importance to you. You are determining your values and the degree they matter to you.

Consider that everything is up for assessment and review. One day you will be walking along, and a thought may cross your mind. Be keenly aware that you are designing your life, you may stop and think, "Now where did that come from, and do I want to continue thinking that way?" Be brutally candid with yourself and choose!

I encourage turning off as many external distractions as possible and tuning into your own inner voice. These sessions do not need to be over an extended period of time. You may also choose to participate in a retreat, or a weekend in.

You can capture moments over several days or weeks, THINK about your life. Dig deep. Be frank and honest with yourself. Write your thoughts out. Don't worry about the format; it could be phrases, notes, long form or short form but *write your responses on paper*. There is something magical about putting your thoughts on paper and then reading them.

This step has three exercises for you to engage in:

Taking Assessment - The roles you play...

Your current relationships...

The activities you give your time and energy to...

EXERCISE: TAKING ASSESSMENT - THE ROLES YOU PLAY...

First, grab your journal or a notebook and list the many roles you play in your life. The purpose is for you to see and understand just how many hats you wear in your life.

Then choose 3 to 5 of those roles that matter most to you.

1. Describe what you appreciate about each role.
2. Share who you get to be in your roles – the good.
3. How would you like the to engage in them?

This is not about the health of these areas, but who you are being or how you interact as the person in that role.

Examples of roles you may play

As the go to one at work / family
 As a son or daughter
 As a parent / stepparent
 As the independent one
 As aunt, uncle, or grandparent
 As employer or employee
 As friend, romantic partner
 As the wise one
 As the oldest, youngest, middle
 As a member of a sports team, organization, church, or social group

Reminder: Be candid, compassionate, and creative in your responses.

Example:

The roles that matter most to me are:

- Sister
- Wife
- Business owner
- Employee

Sister – I appreciate that being a sister provides me with a sense of family, being a part of something bigger than myself, my brothers are my connection to my past. I get to be seen as the person who “has it all together”, and our home is the gathering place for the family. At times it feels burdensome, I feel like I always have to have all the answers and take care of the family stuff. Once my mother passed away, I began feeling like I was taking on the role of mother in the family, a role I don’t particularly relish.

Future Sister – I cannot imagine not being a sister. I would like to see my relationships with my brothers evolve. I want to take the “mother” hat off and relax more and encourage and equip them to find their own answers instead of relying on me.

Example responsibilities

Romantic relationship
Employer / employees
Family relationships
Finances
Mental health
Physical health
Spiritual health
Friendships

EXERCISE: TAKING ASSESSMENT - YOUR CURRENT RELATIONSHIPS...

Let's take a closer look at your list of 3 to 5 roles. Now consider other important responsibilities in your life. Dig deeper and peel back the layers on those roles and responsibilities. Explore your relationships to the people and things in your life.

Start of by noting some of the responsibilities you have in life. I've listed some examples as thought starters. Share how you feel about taking them on.

For those roles you chose, write down who you HAVE to be in your roles – the bad, the ugly and, the embarrassing.

Now take a glimpse into the future -you decide how far. What would you like to see differently?

Sister – I that my relationship with my brothers provides me with a sense of family, being a part of something bigger than myself, my brothers are my connection to my past. I get to be seen as the person who “has it all together”, and our home is the gathering place for the family. At times it feels burdensome, I feel like I always must have all the answers and take care of the family stuff. Once my mother passed away, I began feeling like I was taking on the role of mother in the family, a role I don't particularly relish.

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Reminder: Be candid, compassionate, and creative in your responses.

EXERCISE: TAKING ASSESSMENT - THE ACTIVITIES YOU GIVE YOUR TIME AND ENERGY TO...

Think about what you did in the past month or so. List all your activities to see how and where you use your time and energy

Now focus your responses to these next questions on all your activities in totality. What is your level of satisfaction with your performance in those activities? What value do they add to your life? Why do you participate in them? What impact does your participation in these activities have on your responsibilities?

Looking into your future, where do you want to be with regards to your activities? Why continue them? What value are they now adding to your life? What are your aspirations?

Reminder: Be candid, compassionate, and creative in your responses.

Sample activities

Recreation
Volunteer
Religion
Sports
Political
Social Action
Hobbies

Step 2: Create your Life

The work you did in step one is a great start. Now it's time to fashion your own life. Congratulations. This is where creativity will come in to play. Who do you NOW want to be?

The apple cart analogy

You have just upset the apple cart. And now you have many options. You could get a new apple cart. You could get something other than a cart to hold your apples. You could trade your apples in for oranges. You could mix apples and oranges. You get the point. Step back and know that you don't necessarily have to put APPLES back into the CART. It's all up for change. It's all your decision.

Starting your process

Write your *Personal Action License*, (PAL). It serves as your measurement against how YOU are living your life.

The *Personal Action License* is first and foremost personal, only you can craft it. It is dynamic, achievable, motivational, and aspirational. It is your life created and how you know you are getting done in life what matters most to you.

Suggestions on what to include:

- Use your assessment and future goals from Step 1
- Consider reinforcing those areas of your life that work well
- Aim to address personal or professional habits that limit your effectiveness
- Use aspirational language around roles, responsibilities, and activities
- Look for words that inspire and motivate you
- Consider including a personal motto

Maintain an open mind. Keep pushing through. It may take several drafts for you to get what you want. Give yourself permission to create, show yourself some compassion. Again, don't be concerned with the format. Use the next page to create your first draft. Your PAL will address the following questions. I have included my PAL at the end of this section for your reference.



1. What are my overall life objectives?
2. What are my values? (Be sure they are your newly chosen values.)
3. What are my beliefs about my responsibilities and activities? (Be sure they are your newly chosen beliefs.)
4. What roles are important to me and how will I behave in them?
5. What does getting done what matters most to you look like?
6. Will I know it when I achieve it?
7. What would living the life I created mean for me?

A SAMPLE PERSONAL ACTION LICENSE

I created my *Personal Action License* in November of 2001. And to this day, still live by it. I wrote this because I wanted to be the architect of my own life and then live accordingly.

It has become fully integrated and implemented into my life, yet it continues to live and breathe as I do. When I first wrote it, I kept several copies posted throughout my house. I even kept a copy at work.

Now, I revisit it about once or twice a year to check in with it, see if it still rings true. At first, I updated it several times. I have not changed it in for a long time. This document serves to make the difference in my life and frankly gives me hope for my own future and is the reason for my starting my company

Benefits of YOUR *Personal Action License*:

Along with your friends and family, your PAL can remind you of why you are here on earth.

You will have your *Personal Action License* to refer to.



- It focuses you
- It provides you hope and clarity
- It becomes your moral compass through the “stuff”
 - If you have any type of decision to make in life
 - You feel lost or frustrated
 - You don't quite know what to do next
 - You are faced with something really unsettling
 - You have some limiting self-talk that wants to run the show

A bit of background on my PAL:

Some areas of my life were not working, and I crafted my PAL to address these areas. I aimed to address my procrastination, and view of doing something “tomorrow”. I wanted to be sure that I walked toward things that I perceived as hard and not shy away from them. Lastly, I had aspirations of being physically fit and healthy, which is why I chose to focus on living a balanced life. The homage I pay to dreams and goals has been life long and I felt compelled to include it in my *Personal Action Plan*.

PERSONALLY...

Robin do not discount today because yesterday it held such promise as tomorrow!!

As I go through life, and absolutely each moment in it, I must recognize that how I live also impacts me. I will do all things because and as if I care and care deeply. I expect to constantly question and challenge who I am by continually learning and loving life and strengthening my mind, body, soul, and character. Just because it looks difficult is absolutely no reason to shy away.

I live a **stress-free, balanced** life
exercise with regularity,
 feel, be and act **responsibility**,
 be **honest** with myself and others,
 smile, and be realistically, **optimistic**,
 realize that I also **learn** through my mistakes
 seek and recognize **options** (there are always options), and
 focus on the **solution** only after demonstrating that I clearly understand the problem.

I value my many extremely important roles.

As Mother, raise a loving contributing member to society who I mature with as I watch grow. I want to react to her as who she is now and toward maintaining an open and honest relationship.

As Daughter, recognize that my mother did the best with what she had. To know that because I am me, this does not lessen who she is.

As Employee, think ahead and prepare for change because change is a fact of life.

As Friend, respect our differences, learn from them, and remain open minded.

Recognize my fears embrace them, conquer them. There really are so very many ways to succeed (and fail) – Persona Victories

Live as if goals are dreams in action and dreams are goals in waiting.

You really can do this!

Step 3: Live your Life

Your *Personal Action License* (PAL) is your measurement against how YOU are living your life. Remember, it's personal, dynamic, achievable yet aspirational and inspirational. And you are about to put it into action. You are about to embark upon your own journey to get done what matters most to you.

Living out your Personal Action License

There is good news here, that's totally up to you! Since it is personal, you decide how you will execute on your PAL.

Here are a couple of approaches you may consider taking, or create your own way of living your life. Put your PAL to your test.

- Let it rest for a few days or weeks and then edit your draft
- Test-drive your plan over the next week or month or so
- Share your PAL with a supportive friend, your Life Coach, or mentor
- Focus your energy inward on your relationship with yourself
- Focus your energy and awareness on one or two roles at a time
- Focus your energy and awareness on one or two responsibilities
- Focus your awareness on one or two activities that matter to you

Be purposeful and intentional when you are wearing one of your hats, (roles) or are participating in an activity or taking care of a responsibility. At the end of day assess how you did. Did you meet your goals? Did you act freely?

*Did you experience **Personal Freedom**?*

I mentioned at the start of this workbook that this is an iterative process. Now is the time to refine your PAL. After you have lived with it for a while, you may want to update it, modify it, tweak or not.

Assessing who you want to be in each of your roles, how you engage your responsibilities, and even which activities you decide to participate in is an ongoing process, as if life. So, check in with your *Personal Action License* periodically.

EXERCISE: YOUR JOURNEY TO GETTING DONE WHAT MATTERS MOST

Great work on assessing your life and completing your *Personal Action License*, I applaud your efforts! AND your work is not yet complete. Your PAL is a living document and really must fit your life. After you have chosen your approach for evaluation your PAL and living with it for a while, address the following questions.

- Am I getting done what matters most?
- Have I included all the people that are important to me?
- Have I considered and addressed all areas of my life that matter to me?
- Are there areas that hold more (or less) importance than I originally thought?
- What differences have I noticed about myself and interactions with others?
- Are my interactions with others meeting the goals I set for myself?
- What is new, what has progressed, what is the same?

How will you test or live out your plan?

How often will you check in on your plan?

What is the date of your next check in?

What have you put in place to be sure you check in on that date?

THANK YOU!

Below are many ways to contact me.

Phone: 314-518-3020

Snail mail: 177 Weldon Parkway
Suite 1494
Maryland Heights, MO 63043

Email: coachrobin@rightlysuccessful.com

Facebook: <http://www.facebook.com/RightlySuccessfulLifeCoaching#>

Web Site: www.rightlysuccessful.com



Keep growing and all the best in living a Rightly Successful life!

I am very excited for you.