

# How To Excel At Life Planning; A life Planning Template

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## Introduction

We all have hopes, dreams, and aspirations in life. But how many of us actually achieve our goals?

Often we spend a lot of time thinking or talking about what we want. But we don't take steps to achieve it. It's not because we're lazy. It's because we don't know where to start. We don't have a plan.

Life planning, however, can serve as a roadmap or guide to making those dreams a reality.

Life planning can help you if:

- Your life feels out of control
- You struggle to make decisions
- You feel lost and lack direction

Use this step-by-step guide and customizable life planning template to help you get started.

## **A. What is life planning?**

A life plan is both a guide and a reminder of what you want to achieve in your life. It helps you realize your dreams and meet your personal and professional objectives.

There's no reason why you can't achieve your goals, as long as they're realistic. Often what holds us back is the fear of failure.

A life plan can help you overcome this fear and reach your objectives.

It doesn't have to be incredibly detailed. Instead, it serves as a general guide and should be flexible.

Life is unpredictable. Your life plan should leave room for unforeseen possibilities, changes, and crises.

## **B. 5 benefits of having a life plan**

A case study at UCLA by psychologist Emily van Sonnenberg asked students to keep an intention journal. Each morning, they wrote down their intentions for the day.

Sonnenberg found that students who wrote down their goals achieved them 92% more often than those who didn't.

This result proves the power of planning. Let's take a more detailed look at the benefits of life planning and how it helps you achieve your goals.

### **1. A life plan helps you make your dreams a reality**

A life plan gives you the confidence to take action and overcome your fears.

### **2. A life plan helps you prioritize**

Making a life plan helps you identify your priorities. This way, you only focus on things that move you in the direction of your dreams.

### **3. A life plan helps you make better decisions**

Knowing your goals and values can guide your decision-making process. This helps you make decisions that are in line with them.

#### **4. A life plan keeps you motivated**

Writing down your goals is essential for staying focused on them. Place your life plan somewhere you can see it and [read it every day to stay motivated](#).

#### **5. A life plan makes you feel empowered**

A life plan gives you a sense of control over your destiny. It reminds you that the ability to achieve your dreams is in your hands.

### **C. How to make a life plan: a step-by-step guide**

Follow this seven-step process to create your life plan.

#### **1. Create a vision**

To get started, imagine your dream life. Be as specific in the details as possible.

Picture yourself already there and write out your vision. Use the following questions to inspire you:

- What do you see, smell, or hear?
- What does the light look like?
- Who are you with?
- How do you spend your days?
- Where do you live?
- How do you feel?
- What do you do for a living?
- How much money do you earn?
- What is your daily routine?

Once you have written your vision, think about what you need to do to achieve it. Make a list of steps, such as gaining a new certification or reaching a certain income level.

Try to be realistic, but at the same time, don't hold yourself back from dreaming big.

#### **2. Perform a self-assessment**

A self-assessment of your achievements so far gives you a starting point for your life plan.

Take stock of your successes as well as your failures. Look for the lessons learned and experiences you don't want to repeat. Identify your strengths and weaknesses.

When doing your self-assessment, look at different areas of your life, including:

- [Relationships](#)
- Personal growth
- Finances
- Health

Grade each area on a satisfaction level of one to five. This will help you identify your strengths as well as your areas for improvement.

### 3. Prioritize your life

Now that you have your vision and areas for growth, it's time to prioritize.

You don't need to set detailed goals at this stage. The aim of this step is to decide what's essential and what you need to let go of.

Your time is precious, so you need to invest it wisely. Prioritizing will help you do so.



### 4. Identify your values

Analyzing your past can help you [identify your values](#). When you look back at past decisions, you can see what the motivating factors were behind them.

For example, if your career trajectory has been one in which your income has steadily grown over time, it shows that money is one of your core values.

But if you've chosen fewer responsibilities at work in exchange for less money, it means you probably value less stress and more free time.

Negative past experiences also teach us about our values. They show us the things we want to avoid experiencing again.

Bearing your values in mind will help you make decisions that are in line with your dreams.

## 5. Establish SMART goals

Once you've identified your vision and take stock of your priorities and values, the next step is to set effective goals.

Aim to set both medium and long-term goals that are realistic and achievable.

Identify different goals for the areas of your life you evaluated in your self-assessment. Make sure they align with your priorities and values.

Use the SMART method to set effective goals.

SMART stands for:

- **Specific:** each goal should be specific. For example, rather than “lose weight,” your goal should be “lose 10 pounds.”
- **Measurable:** Establish how you will measure your goals.
- **Attainable:** make sure your goals are realistic and possible to achieve.
- **Relevant:** the goal should be relevant to your long-term vision and compatible with your priorities and values.
- **Time-bound:** Set an ambitious but achievable deadline for the completion of your goal.

## 6. Outline an action plan

Your action plan should detail a step-by-step process that will help you work toward your intermediate goals.

Identify the daily actions that will add up over time and help you build momentum. Schedule them in your calendar and commit to taking action every day.

Place your action plan somewhere you will see it — for example, above your desk.

Don't forget to celebrate every milestone and reward yourself for your achievements.

## **7. Adjust as necessary**

Remember, your life plan is a tool that guides you toward your goals. However, we all experience setbacks at some point, and that's okay.

If you miss a goal or take longer than planned to reach it, don't give up.

Revise your life plan and make adjustments as needed.

## **D. The right questions to ask when making a life plan**

As you write your life plan, ask yourself the following questions, and keep your answers in mind:

### **1. What results do you want to achieve?**

As you create the vision of your dream life, try to be as specific as possible. Think about the results that accompany your desired outcome.

For example, let's say your goal is to become a director in your company. Ask yourself why you want to achieve this goal, and what difference it would make in your life.

Some of the possible results may include:

- Greater financial stability for your family
- Having greater influence and impact in your sector or field
- Fulfilling a lifelong dream
- Feeling more confident
- Being able to pay for things or experiences that you otherwise couldn't.

### **2. What actions will achieve those results?**

Once you know the results, work backward to define the steps that will help you make continuous progress toward that objective.

Make sure you identify any actions that might require support. Make a list of trusted friends and loved ones and ask them to help you.

### **3. How will you stay motivated?**

Writing a life plan can be fun and exciting. It can also increase your motivation levels.

But one day soon, something may happen that deflates your motivation like an old balloon.

Maybe you'll come up against an unforeseen challenge. Perhaps you'll fall out with your best friend. Or maybe you'll just get out of the wrong side of the bed.

Whatever it is, you'll lose your motivation. You'll want to throw in the towel.

And that's why you need to prepare by asking yourself how you will stay motivated.

When you're working toward a big goal, break it down into smaller goals. Celebrate and reward yourself for those achievements.

Ask your trusted friends and loved ones to help you stay motivated when the going gets rough.

#### **4. How will you measure progress?**

Setting milestone goals is a good way to measure your progress.

Going back to our previous example, becoming a company director is not something that's likely to happen overnight. The best way to measure progress would be to break it down into smaller goals.

These goals might include developing new skills that are required for the role of director. For example, an intermediate goal could be to complete a training or certification.

Another progress goal for an aspiring director could be to steadily climb the ranks. If you start as a project manager, your next goal could be to become a program manager.

Set yourself deadlines to meet each progress goal. This will help make sure you implement your life plan within the specified time frame.

#### **E. 5 Areas to Include in Your Life Plan**

Some people want to plan every aspect of their lives. You might decide to plan in some areas, but not in others. It's your life plan, so it's up to you what to include.

To inspire you, here are five of the most common areas to include in your life plan:

## 1. Health and well-being

Health is true wealth. Without it, nothing else matters.

Whether you're healthy, unhealthy, or somewhere in between, health and well-being should be on your life plan.

Even if you're fit and healthy now, it's always wise to plan ahead — your future self will thank you for it.



### Ways to include it in your life plan:

- Set a healthy eating goal, such as meeting your five-a-day requirement
- Aim to drink at least two liters of water per day
- Identify a healthy weight
- Take 10,000 steps per day
- Sign up for a fitness class
- Hire a personal trainer, nutritionist, or health coach

## 2. Relationships

Whether you're single or in a committed partnership, there are always ways to improve your relationships.

All relationships start with the relationship you have with yourself. If you're bitter or self-loathing, those qualities can influence your relationships.

Beyond that, there are ways to learn to be a better partner, friend, parent, or relative.

Perhaps you want to be a better listener. Maybe you want to be more patient with your kids. Or maybe you yearn for a deeper connection with your partner.

### Ways to include it in your life plan:

- If you're in a relationship, schedule quality time with your partner to avoid getting stuck in a rut.



- Plan trust-building and intimacy activities that strengthen your bond with your partner.
- If you're single, set aside time each week to work on the qualities that you think would make you a better partner in the future.
- If you're looking for love, set yourself targets. For example, you might want to go on dates with two new people per month to improve your chances of meeting someone.

### 3. Career

If you're unhappy with your current job, you need a plan to change it.

But even if you're happy with where you are now, you still need to plan for your future growth and development.

And if you're an entrepreneur, you already know planning is a prerequisite for business success.

#### Ways to include it in your life plan

- If you want to change your current job, set a goal to send out a certain number of job applications per week.
- If you're happy with your current job, imagine where you would like to be in five or 10 years from now. Then, define the steps and time frame required to achieve those results.
- As a business owner, set annual objectives for your business. Consider [working with a business coach](#) to help you achieve them.

### 4. Finances

Financial planning is closely linked to your career aspirations. Set realistic financial goals according to the profession you choose.

When setting financial goals, think about your priorities and values. For example, if spending time with your family is important to you, you might decide to prioritize more free time over more money.

If that's the case, you might not want to aim for the role of CEO. Therefore, you won't aim for a CEO's salary, either. Adjust your financial goals accordingly.

#### Ways to include it in your life plan:

- Set yourself a monthly budget and stick to it
- Become familiar with the earning potential in your industry

- Set long and short-term goals
- Consider working with a financial advisor

## 5. Community

One of the secrets to a long and healthy life is to be part of a community.

According to research, [loneliness is as bad for your health as smoking](#). Yet only 53% of Americans have meaningful in-person interactions on a daily basis.



### Ways to include it in your life plan:

- Schedule regular get-togethers with friends and family
- Volunteer in your community, such as at a care home
- Participate in religious or spiritual groups

## F. How to create an accountability plan

Creating your life plan is the easy part. The hard work starts when you have to implement it.

Sooner or later, you'll face obstacles that will test your commitment.

It might be a professional setback, such as not getting the job you want. Or it may be a personal challenge, such as a breakup or health issue, that slows your progress toward your goals.

An accountability plan can help you stay on track. Here's how to create one in three steps:

### 1. Find an accountability partner

Share your life plan and milestone goals with a trusted friend, family member, or mentor.

Ask them to help you stay motivated as you work toward your goals. They can do this by being your accountability partner.

An accountability partner is someone who helps you stay motivated and overcome challenges when they arise.

If you don't have a friend or family member who can help, you might want to [consider working with a coach](#).

## **2. Measure your progress**

Agree on regular check-ins with your accountability partner. These could be weekly, monthly, or quarterly, depending on your objectives.

On the agreed date, give them an update in writing or in person.

Check on your SMART goals and measure your progress. Have your accountability partner celebrate any wins with you.

## **3. Revise as necessary**

A life plan is a guide that helps move you toward your goals.

It should be flexible enough to adapt when something isn't working.

If you struggle to meet your goals, work with your accountability partner to adjust your life plan and set more realistic goals.

## **G. A Life Plan Template To Help You Get Started**

A life plan is a personal document. Each one is unique since we all have different priorities, goals, and values.

You can customize this life planning template to suit your needs. Alternatively, use your creativity to create your own.

The image shows a worksheet titled "My Life Plan" with a red and orange background. The form is divided into several sections for planning and goal setting. At the top is a large box for "My Life Vision". Below this are three boxes for "My self-assessment", "My priorities", and "My values". The next row contains "My SMART goals" and "My action plan". A section titled "My Goals for" includes five boxes for "Health and well-being", "Relationships", "Career", "Financial", and "Community". The "BetterUp" logo is at the bottom left.

## G. Life Planning Helps You Keep Going

Staying motivated through life's challenges is not easy, but it is possible.

Small daily actions add up to significant changes over time. Life planning can help you keep putting one foot in front of the other until you achieve your goals.

Working with a coach is a proven way to achieve and even exceed your goals. Discover how [BetterUp's expert coaches can help you reach them even faster.](#)

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