

# MY PLAN

aware. mindful. resilient.

templates by cynthia ackrill, md

# MEETING TEMPLATES FOR THE MOST IMPORTANT MEETINGS OF YOUR LIFE

ONE-ON-ONE WITH YOU! PUT MORE **YOU** ON YOUR CALENDAR AND BACK IN YOUR LIFE

## What if...this is the year:

1. You carve out a little time now to save huge time and stress throughout the rest of your year(s)?
2. You disrupt your “busy-ness” for a few hours to hit “refresh” on your perspective, to rekindle your curiosity and creativity?
3. You actually capture your hard-earned wisdom and put it to work for you to create better strategies for your life?
4. You hit “pause” long enough to harness the power of reflection and strategic thinking?
5. You get clear about who you are right now and where you want to go—what motivates, energizes, supports your best you?
6. You find ways to tweak your life to be more in line with your values, goals, and dreams?
7. And you find ways to continuously renew your energy and find meaning going forward? To put more YOU in your life?

## Are you ready to be the CEO of your life?

The payoffs are enormous! Health, deep happiness, resilience, effectiveness, energy, and focus - not bad for a small investment of time and attention.

Your first reaction may be:

- *I don't have time!*
- *I missed the January start- maybe next year?*
- *I'm already too behind/disorganized/discouraged to even start this! I'm afraid to find out how off track I am*
- *Won't this just add to my stress?*
- *You don't understand my circumstances—you have no idea how stuck I am!*

DO NOT despair!!! Yes, you may have real obstacles, challenges, but thoughts like these are just your mind trying to sabotage your inner CEO. In truth, it does not matter one iota where you are now. Any time spent thinking about where you want to go and how to get there is a gift to you and everyone around you. No athletic coach would go into a championship series without stepping back to consider all the variables and options to create personalized game plans—this life is your championship series!

True, some variables are completely unpredictable or out of your control, but so many more are not. Claim your control to create strategies that will guide your year, your month, your day toward goals that reflect your values, tap your strengths, and harness your wisdom and spirit. And here's the cool part:

## You really don't have to radically alter your life, your habits, your career to find more energy and meaning.

Small “tweaks” in your daily thoughts or choices can lead to massive changes in your experiences. You already know a lot about how you work/live/love best—put that wisdom to work!

*"Those who improve with age embrace the power of personal growth and personal achievement and begin to replace youth with wisdom, innocence with understanding, and lack of purpose with self-actualization."*

*--Bo Bennett*

## MINDSETS of BRILLIANCE AND RESILIENCE— 5 C's and a G©



### How to use this guide:

1. **Set aside an uninterrupted block of time on your calendar:** 2-4 hours for the yearly meeting, 30 min for the monthly meeting, and 15 min for the weekly meetings. It's best to make the monthly and weekly meetings have a regular time slot combining them once/month. You can tweak the times later as you develop your own rhythm. But you must actually put these on your calendar! Give these meetings a fancy or funny name? And do not get hung up if January is long over—any time is a good time to start!

2. **Make it sacred time!** Turn off the phone (ok, except for true emergency alerts), the computer, TV, etc. (Checking one email can reduce your thinking power for 15 min! Don't do it!) You can play music that supports your best thinking. It's really great to take the yearly meeting away from your office or home, away from all the cues that limit your perspective. (Some clients make this an annual retreat somewhere inspiring!)

3. **Print off the templates** so you can doodle, write in the margins, make a mess, and find your real insights. (You can always scan it later—or redo it in a pristine computer way ;))

4. **Get grounded** before you start to access your best brainpower: stretch; shake out any tension; take a few slow, really deep, belly breaths; give yourself permission to actively let go of today's busy-ness and focus on this project.

5. **Access your positive, creative brain.** Take a moment to be grateful for the opportunity to focus on you and your life.

Acknowledge your frustration or dismay or even stronger emotions as real, and recount in your mind times when you've been creative, resilient, focused, energized - those strengths are all there for the asking - ask yourself to step into that mindset. And do so with lightness of heart.

6. **Use pencil!!!** You are a living, growing, changing organism in a dynamic world. Committing to goals is truly important, and so are flexibility, adaptation, tweaking and editing.

7. **Take breaks** -move, stretch, breathe, drink, snack, close your eyes for 5 min, walk outside for 10, change the music or setting, etc. these all support brainpower!

8. **Never, ever, ever forget that you are not alone!** This guide is designed for your self- reflection. That said, many of us do our best thinking in conversation. Who are your best cheerleaders, clear thinkers, honest and safe confidants? This is, of course, what I do as a coach—please reach out if you'd like a thought partner on your journey. And even if you have a super-strong need for autonomy, humans are wired for social connection. You increase your chances of success when you increase your connections.

## YEARLY MEETING TEMPLATE

Use pencil!!!

Close the past year with reflection:

What are your wins from last year? What went well? What made you proud? Where did you find resilience?

---

---

---

---

---

What habits do you already have that contribute to your success, health, happiness? (Think how you support yourself physically, mentally, emotionally, and spiritually.)

---

---

---

---

---

What did you learn from last year's challenges, obstacles, or losses? Step out of your emotions to capture the lessons—the ones you will come to appreciate over time.

---

---

---

---

---

What habits do you have that tend sabotage your best self? (We all have them! Be honest with yourself.)

---

---

---

---

---

What part of your growth do you want to carry forward? Or who are you when you are at your best?

---

---

---

---

---

*"A goal without a plan is just a wish."  
—Antoine de Saint-Exupéry*

## Plan this year:

Start by creating your GPS (Goals driven by Purpose and Vision, Strengths, and Values). If you have done these exercises before, it is always a great idea to refresh, recommit, reconnect to the core of what motivates you. These also make great team or family activities and discussions.

**Values:** If you would like to rethink your values, feel free to download the exercise from my website: Values exercise. You are a good person and you value a lot of good things, but here you want to identify the deep core values that motivate you, inform your choices, are what you want people to experience of you, are what you want to pass on to your family and team, and you are willing to defend. That said don't overthink this or get stuck at this step! You can edit later!

**Strengths:** If you would like to update your strengths assessment visit [www.authentic happiness.com](http://www.authentic happiness.com), register or sign in (no risk), and take the VIA Survey of (24) Character Strengths assessment. (Note: there is a children's version if you want the family to do this. Do not get sidetracked on all the quizzes now, though ;)

Bookmark the page and surf here after your meeting!

You can also add in strengths from other assessments, such as Strengthsfinder.

Top 3-5 Values \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Top 3-5 Strengths \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Vision:

This is your dream of what you would really like for your life. Who do you want to be? This is a far more important question than what you want to do. This can be your vision of your life a year from now, or in 5 or 25 years!

Remember, this is not chiseled in concrete, so don't worry about making it perfect or permanent. Smile, and please make this authentically you, not informed by "should's," old stories in your head, or the desires of others. Get out of your head and into your heart—what really feels good to think about for your future.

---

---

---

---

---

---

---

## Purpose:

What is your overall mission or purpose for this year or for this life, at least as you know it now? Again, do not get stuck here! What is your first answer to, "Why you are on this earth?" It can be as vague as, "to add kindness to the world," or as specific as, "eradicate autocorrect errors for all mankind." The point is when you think of this purpose, you feel motivated, energized, and happy to be your best self.

---

---

---

## Theme:

What one word or phrase will be your theme for this year to remind you of your mission and goal for this year. This is a reminder to you of your “brand” or who you want to be this year: \_\_\_\_\_

---

For example, if this is the year you want to focus on mindfulness, you might pick, “Breathe first!” Have fun with this and do not sweat it! You accomplish what you focus on and coming up with a simple reminder word that you can scribble and repeat, will help you wire your goal into your brain. It will guide your choices toward your purpose, remind you of this work today, and motivate you to stay curious and courageous to pursue your goals. It's your brand!

## Goals:

Now, using your values, vision, and purpose as your GPS, set goals that feel like they will move you closer to your vision. First, just jot down whatever comes to mind, and then rank these goals in order of priority. What would be a real win for this year? It is important to translate who you want to be into action steps. Think about what behaviors you will need to practice (or avoid!) to achieve each goal.

Do not overcomplicate this; be realistic and curious. It is better to feel the satisfaction of achieving one small goal than to be overwhelmed or defeated by 5 lofty (read: “unrealistic”) ones. High-achievers and perfectionists take heed! Stop frustrating yourself with poorly vetted goals and expectations. I am not saying compromise for mediocrity—no! But set your actions steps up strategically to work with your brain, energy, and motivation. Success fuels success.

You can list thought goals and/or behavior goals, ranging from big life changes to shifting tiny habits. Brainstorm!!!

- *Goal: I want to practice self-compassion this year. (Or, I'd like to quiet my inner critic!) Habit: During my daily check-in I will repeat an affirmation.*
- *Goal: I want to be a better sleeper this year. Habit: I will turn off my computer by 9:30 pm.*
- *Goal: I want to get a new job by the end of the year. Habit: I will dedicate time to this process weekly.*

<b>What do you see as the goals for this year to move you in the direction of your mission and vision?</b>	<b>Rank</b>	<b>What habits do you need to put into place or steps do you need to take to support those goals?</b>

Now look at the whole list. Which of these goals excites you, pulls you forward? Start with this one!  
If none, then go back to your vision and find something that does feel achievable and engaging. Always tie the goal back to your “why,” your personal values and purpose.

Remind yourself of your best mindset for this process. Who are you when you are at your best, strongest, most focused, empowered, happy? What mindset will help you achieve goals even in the face of obstacles?

---

---

Feel free to take each goal through the Creating Habits worksheet to set yourself up for success. If you are feeling stressed or overwhelmed, download or repeat the Paper Plate Audit or reach out for some support—it's what I do! Changing behavior is already hard for your brain, but nearly impossible if you are overwhelmed.

**Goal Commitment:** This is where you put it in writing! You can list up to 5-6 for the year. But start with only 1-3 for the first quarter. Pacing works!

This year I will:

---

---

---

---

---

---

---

What are the biggest obstacles between you and achieving your goals?

---

---

And what is your plan to find your power in the face of these? Obstacle strategies create success!

---

---

**Self-care Plan:** How will you take care of yourself this year—physically, mentally, emotionally, and spiritually? (This may overlap with your goals above- no worries!) This step is critical, because you need to be energized in all 4 domains to power your brain and success.

Physically

Mentally

Emotionally

Spiritually

How will you hold yourself accountable to your self-care? What will your check in be?

I will:

---

---

---

---

Where will you find support? Who's on your team? This is critical! As a human, you are wired for social connection and support, even if you are a fully autonomous, amazingly successful high-achiever!

---

---

*"Leaders who fail are the ones who do it by themselves.  
Leaders who succeed are the ones who allow others to help them."  
- Simon Sinek*



## Checklist:

- *Have you put your monthly meetings with yourself on the calendar?*
- *Have you put your weekly meetings on your calendar? (Once/month these are monthly meetings.)*
- *Have you written your purpose and goals on your monthly/weekly template?*
- *Have you written your theme reminder word or phrase in several places?*
- *Have you committed to daily check-ins?*
- *Are you excited about one goal this year?*
- *Are you committed to a research mindset? (Life is all research and you are experimenting to see how your life best unfolds. Treat each miss as simply data for better finding the wins. And practice self-compassion.)*

## CONGRATULATIONS!

Take a moment to close your eyes and picture next year this time, feeling the huge rewards of getting proactive in your own life.

Now stand up, take [power pose](#), and thank yourself for this time investment! You are rewiring your brain, increasing your power and mindfulness, and bringing “repeated attention to your intentions” to create the life you want! Go for it!!!!

# MONTHLY MEETING TEMPLATES

MONTH \_\_\_\_\_

**Reflections from last month:**

Wins:

---

---

---

---

Lessons, challenges, obstacles: (stressors will happen! how are you handling them?)

---

---

---

Look over Yearly Pages - Values, Strengths, Vision, Mission, Theme - any insights, revisions?

---

---

---

---

**Goal/Habit Check in:**

Remember this is all research. You may revise anything. If you feel stuck with something, this is not fuel for your inner critic, but data for your creative exploration of how get what you want. Make sure you recognize and celebrate your progress. This will feed future success.

<b>Goals For This Year Moving you in the direction of your mission and vision</b>	<b>Progress (0 – 100%)</b>	<b>Habits and Steps To support your goals</b>

## Self-Care Check In:

<b>How is your energy in each domain:</b> 1 - depleted 3 - wearing thin 5 - good days, hard days 7 - fairly energized, but need to be careful 10 - renewed and ready to rock	<b>Progress Since Previous Month?</b>	<b>What's needed to support you this month?</b>
<b>Physically</b>		
<b>Mentally</b>		
<b>Emotionally</b>		
<b>Spiritually</b>		

Right now, look at your calendar for the month ahead and write in ways to support your energy. Need to block time to finish something, need friend time, some exercise, a massage, more outdoor time, more sleep, a stock up on nutritious snacks? Commit and put it in writing- you are far more likely to make it happen.

### What would be a win for the month ahead?

---

---

---

---

### What might get in your way (and how do you hope to handle it)?

---

---

---

---

### What's your theme? \_\_\_\_\_

**Create or update your master to-do list.** Make sure you are capturing everything in all categories of your life in one location. This can be digital or good ole pencil and paper, but it needs to be truly complete with all projects, duties, commitments, etc, from work and personal life. This "capture" gives you the big picture from which you can strategize more creatively.

Now, **GO FOR IT!**

# WEEKLY MEETING TEMPLATES

WEEK \_\_\_\_\_

## *Reflections from last week*

Wins:

---

---

---

Lessons, things you need to move forward to this week:

---

---

---

## **Goals check-in:**

Take a few minutes to review your values, strengths, purpose (GPS), and your current goals on your yearly meeting notes. What do you need to stay on track? What needs tweaking? What needs to be let go?

---

---

---

## **Self-care check-in:**

What do you need physically, mentally, emotionally, spiritually, and where can it fit on your calendar? I.e., is your resilience plan on your calendar?

---

---

## **Time management:**

1. Apply some strategic thinking to your week. Update your to-do list. Take a few minutes to capture loose ends and to-do's from all your "inboxes."
2. Do you have all your current goals, projects, duties, time commitments (work and personal) written down? Capture and put it all in luddite or digital written form to save brainpower! (And to sleep better!)
3. Can you rearrange anything in your week to create more useful blocks of time? (Don't forget white space and time for processing and creating.)
4. Anything you can delete, defer, or delegate to be more effective?
5. Anyone you need to contact? Put them on your list, now.
6. Are there any opportunities for multi-purposing? (Not multitasking! Ex. Make a meeting a walking meeting.)

Note: If you are starting to feel overwhelmed, schedule a little more time to revisit your big picture, capture and get clear on your stressors, rebalance your self-care, or reach out to your coach ;). Use a big sheet of paper or white board for this; dump all your to-do's and pressures in one place. This big picture capture can relieve a lot of stress and bring clarity to your challenges. (See my [Paper Plate exercise.](#))

## **What would be a win for this week?**

---

---

---

---