



My 12 Month Life & Business Dream Planner

INTRODUCTION

Hello, my friend!

What's your vision for your life? I know, that's a deep question but there is no dress rehearsal for life; this is it and we deserve to live our best life every single day.

Why not live a life that you don't need or want a vacation from? Why not live in your dream house in your dream location? All of these things are possible, and you don't have to wait until retirement to achieve these goals. Life is NOW so let's remember how to dream big and plan out your dreams!

This planner is all about dreaming about your ideal life, prioritizing your goals, and putting those goals into action steps. Will you accomplish everything overnight? Of course not. But with some self-reflection and careful planning, you will have an action plan and timeline complete by the time you complete these exercises.

Remember, too, that nothing is simply handed to us. The word 'manifest' is used in a few places but that doesn't mean closing your eyes and making a wish. Manifesting simply means speaking your dreams out loud, taking action, and recognizing the right opportunities that come your way as a result. These opportunities will serve as your road map to your ultimate goals.

Are you ready to get started dreaming big?

STEP ONE: Define Your Most Audacious Life & Business Desires

Are you ready to embrace your inner child and dream BIG? As children we get up out of bed, ready to tackle the day with vim and vigor. We have great big dreams of what we want to be when we grow up and nothing seems out of reach.

That's the kind of excitement you need when you dream about an audacious life. You deserve the life of your dreams, but you won't know what you want unless you sit back, close your eyes, and dream away.

If you want to create a dream life and business that looks different than where you are now, you have to know your next step. Even if you have a clear image of your big picture dream, it's unlikely you'll jump from your present life into that bigger life. You still can benefit from using a roadmap, so you don't feel overwhelmed during the process. Let's start breaking your dreams down into small, doable goals by thinking backward about where you'd like to be a year from now.

Sit back, close your eyes, and dream about the next year of your life. In the first exercise, you'll journal about what you visualize for yourself and your family. What do you want your life and business to look like a year from now? When thinking about your business, think about what you'd like your business to look like in terms of offers, team, income, expenses, tools and systems, etc. How would you ideally spend your time in your business? What would your business allow you to do?

My 12 Month Life & Business Dream Planner

If you want a well-balanced life, think outside of just family and business goals. Give some thought to your mental health, physical health (eating habits, exercise, etc.), wealth, home, finances, family, self-care, and business. Use the chart/journal space to dream big and picture yourself in your ideal life one year from now.

In the 2nd exercise, do a brain dump of your dreams. Not only will this clear out clutter from your mind, but you'll be able to organize and prioritize which goals/dreams/desires are most important to you.

List out every possible goal you want to achieve from the categories in the first exercise. What would you like to do/have/be in each of those categories in a year from now in your dream life or dream business? Write out at least 30 specific goals.

You might have goals that will technically take more than a year (for example, "pay off all my student loans"). If this is the case, write it down anyway. We'll talk about how to break down larger goals like this into smaller pieces in a few steps.

EXERCISE: Look ahead and visualize your life ONE year from now.

Journal what you want to accomplish in the next year. Make this exercise fun by dreaming big!

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What do you want your life and business to look like a year from now?

In one year, my LIFE will ...

In one year, my BUSINESS will...

In one year, my MENTAL HEALTH and PHYSICAL HEALTH will...

In one year, my WEALTH and FINANCES will...

In one year, my HOME and FAMILY will...

In one year, my SELF-CARE routine(s) will...

In one year, my TRAVEL PLANS will include...

Other notes: Did you think of other dreams that fall into different categories? Write them down here!

EXERCISE: Brain Dump Your Dreams.

Write out at least 30 specific goals – work and personal – that you'd like to accomplish within the next year. Have a goal that might take longer than one year? Write it down anyway!

Brain Dump Your Dreams

GOAL #1:

GOAL #11:

GOAL #2:

GOAL #12:

GOAL #3:

GOAL #13:

GOAL #4:

GOAL #14:

GOAL #5:

GOAL #15:

GOAL #6:

GOAL #16:

GOAL #7:

GOAL #17:

GOAL #8:

GOAL #18:

GOAL #9:

GOAL #19:

GOAL #10:

GOAL #20:

GOAL #21:

GOAL #26:

GOAL #22:

GOAL #27:

GOAL #23:

GOAL #28:

GOAL #24:

GOAL #29:

GOAL #25:

GOAL #30:

STEP TWO: Dig Deep Into Your “Big Why” to Stay Wildly Motivated (and Manifest with Way More Ease!)

Before you choose your which goals to focus on in the next 12 months to start bringing your dreams to fruition, you have to get clear (and real) on why these goals matter. There’s a popular saying: If your why doesn’t make you cry, it’s not big enough, so be sure you’re digging deep into your soul.

Your WHY is your motivation for doing what you’re doing. Very often your WHY is related to your business or career, as in “Why did you start on this path?” but you can also have a WHY for any goal. And just as important as defining that WHY is looking past the surface answers into your psyche. Your real answers are hiding in your subconscious, stuck inside those old stories that we learned from childhood about whether we can or can’t achieve something.

My 12 Month Life & Business Dream Planner

Consider this example:

Q: WHY do you want to lose 30 pounds?

A: So I can buy a new wardrobe.

Q: Why do you want a new wardrobe?

A: Because I'm tired of looking frumpy in my old clothes.

Q: Why do you think you look frumpy?

A: Because I put everyone else's needs ahead of my own, hence no new clothes for myself.

Q: Why do you put your family's needs ahead of your own?

A: Because that's what I was taught as a child: A good mother puts her children above herself.

So, in this example, this mom doesn't want to lose 30 pounds simply to buy new clothes. Her real WHY is so she can feel worthy of feeling good in her body and in new clothes. She has lost part of her identity and now is ready to make a commitment to herself to get healthy and lose 30 pounds.

Can you see how motivating it will be to her to find herself again? To find her joy in life by taking care of herself and putting her needs first for a change? This is how deep you should get with each of the 30 goals you wrote in the last exercise.

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In this exercise, explore your reasons for choosing your goals. Pick and choose the top 5 on your list for this deep dive, especially so you don't feel overwhelmed. Answer the questions for each goal but also keep digging by asking yourself WHY. There's always another layer to peel, much like an onion. Your surface answer is easy to state; it's the deeper, inner layers where true meaning lies and those are more difficult to reach.

EXERCISE: Answer the following questions for your Top 5 goals from Step One.

Dig DEEP by asking yourself “why” multiple times.

#1 Goal:

Why do you want to achieve this?

Dig deeper...WHY do you want to achieve this?

Dig deeper...WHY do you want to achieve this?

Go further...WHY?

What will keep you motivated to continue to work toward this goal when setbacks come?

Is this a goal you truly want to tackle—or is it one you feel like you should?

Is this a goal you have the time, energy, resources and desire to work on this next year?.

#2 Goal:

Why do you want to achieve this?

Dig deeper...WHY do you want to achieve this?

Dig deeper...WHY do you want to achieve this?

Go further...WHY?

What will keep you motivated to continue to work toward this goal when setbacks come?

Is this a goal you truly want to tackle—or is it one you feel like you should?

Is this a goal you have the time, energy, resources and desire to work on this next year?.

#3 Goal:

Why do you want to achieve this?

Dig deeper...WHY do you want to achieve this?

Dig deeper...WHY do you want to achieve this?

Go further...WHY?

What will keep you motivated to continue to work toward this goal when setbacks come?

Is this a goal you truly want to tackle—or is it one you feel like you should?

Is this a goal you have the time, energy, resources and desire to work on this next year?.

Extra Notes:

STEP THREE Clarify Your Desires to Get Fiercely Focused on Your Most Important Dreams

Once you decide on some goals and have a better understanding of how long it will take you to complete them, it's time to start prioritizing which goals to begin with. As with anything, if you have too many options to choose from, you might start with something that's not quite as important or impactful when it comes to reaching your dream life.

In this exercise, you'll put each of your 30 goals into a category (or 2) from Step One. This will help you understand which area(s) of your life you have a desire to focus on. Some goals – like earning \$100k this year – can fall under multiple categories such as Wealth and Finances so write it in both places. You'll soon detect a pattern: Whichever category has the most goals in its column is where your heart wants to focus.

Are there some categories with no goals? Quite possibly and that's fine. Maybe you feel fulfilled in those categories or possibly you need some more time to think about what – if anything – you'd like to accomplish. There's no rush to get this figured out and these lists will change as you grow as a person and accomplish more goals. This is merely a starting point.

My 12 Month Life & Business Dream Planner

Also think about and journal your thoughts about where these goals fall and how you feel about focusing on each area of your life. Are you excited? Do the top areas make sense to focus on immediately? Will these goals really propel you toward your dream life? Or is there another area that feels safer? There are no right or wrong answers here. The purpose is simply to prioritize those goals that will help you achieve your dream life faster without having you distracted with other random goals.

EXERCISE: Place each of your goals into at least one category. List in 2 categories when appropriate.

Use the chart on the next page.

Match Your Goals with a Category (or 2)

Ex: eating habits, exercise, etc.

Mental Health

Physical Health

Wealth

Home

Finances

Family

Self-Care

Business

Other Thoughts

Journal your thoughts here. What patterns do you detect? Do you have categories without goals? Why? Does this bother you? Why or why not?

STEP FOUR: Simplify Your Goals & Amplify Your Results with SMART Goals

Setting a goal is great; but how will you monitor your progress toward reaching that goal? Simplifying your goals into smaller action steps and tracking your progress regularly will propel you forward instead of keeping you in a state of overwhelm.

In this first exercise, sort your goals based on how long each goal will take to achieve, such as 1 year, 3 years, 5 years, 10 years. At any time, you'll likely be working on both long-term goals and short-term goals. This means you might choose to work on 3 goals that you can complete from start to finish next year, and other goals that won't be completed for 5 years but that require you to start consistently working toward them this coming year.

For example: You want to pay off your student loans (3 years), but you also want to make \$100k in your business (in 1 year). The idea behind putting a time frame to each is you can then create plans for reaching those goals, such as setting aside a certain amount of money each month for your student loans or knowing how much income you need to earn monthly to reach your \$100k goal.

My 12 Month Life & Business Dream Planner

In the second exercise, you'll apply SMART principles to each of your goals.

SMART stands for

- Specific – Clear and not vague
- Measurable – Measurable
- Attainable – Can you achieve it?
- Relevant – Does this specific goal fit in and help you get closer to your dream life?
- Time-Bound – What timeframe can you accomplish this in?

Some SMART experts use the R to stand for Realistic, which can be similar to Attainable. Can you lose 20 pounds in 30 days? Maybe, but you'll likely need to use drastic measures to do so. Drastic doesn't sound realistic, does it? The idea behind goals is that they will benefit you for the long term. They will bring something of value to your life. If you reach a goal by drastic measures and then go right back to your old habits, that's not truly reaching your goal and there's no long-lasting value added to your life if you resort back to old habits right away.

The same is true for any money goals you have in mind. If you want to increase your revenue to \$50k per month, that's wonderful and certainly attainable but be realistic in how long you'll need to reach that level, especially if your current earnings are well below that \$50k amount.

Lastly, plan how you'll track your monthly results. For example, if you wanted to walk 100 miles in 30 days, how will you measure each walk and tally the total? If you want to onboard 3 new clients this month, how will you track that progress?

Anything is possible but being realistic with your time will keep you moving forward without getting frustrated.

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EXERCISE: Sort your goals into different time categories.

Use 1 year, 3 years, 5 years, and 10 years to start. Remember, this list can be fluid and can be adjusted at any time.

Goal Time Frames

1 Year	3 Years
5 Years	10 Years

Exercise: Set SMART goals.

Take each of your top goals and set SMART parameters for each. For each goal that is Relevant, declare very specifically what you want to achieve and by a specific date and time, then decide if that timeline is realistic and attainable.

Goal	Deadline	Is this Attainable/Realistic?	How will you measure/track results?
1 Year			
3 Years			

Goal	Deadline	Is this Attainable/Realistic?	How will you measure/track results?
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5 Years

10 Years

STEP FIVE: Pick Powerful & Impactful Goals (So You Can Ditch “Goal Overwhelm” & Make the Next 12 Months Your Best Ever!)

You now have a list of 30 potential goals to hit in the coming year. However, trying to work on 30 goals at once is a prescription for overwhelm. Here are a few ways to narrow down which goals to work on:

- If you're brand new to setting goals and holding yourself accountable, choose one short-term goal to focus on first from the 1-year category. When you achieve that and your confidence is boosted, you can then choose multiple goals.
- Choose one long-term goal from the 3- or 5-year category and at least 2 short-term goals from the 1-year category.
- Choose 3-5 smaller goals to focus on and a longer-term goal from your 3-, 5-, or 10-year category.

My 12 Month Life & Business Dream Planner

In the end, however you decide to conquer these goals is your decision. Once you get into the daily process of working for these goals you may decide to add something else to your list and that's perfectly fine. Likewise, if you bit off more than you can chew, move one or two goals back to the waiting list until something else is achieved first. You are in control of your calendar and scheduling. Goal setting should be fun, not stressful.

If you're having difficulty narrowing down your priorities, here are some tips:

1. Choose the top 3 goals in each timeframe (1 year, 3 years, 5 years, 10 years). From there, choose 3-5 goals from various categories so you have a "variety" of goals to work on that will help you move toward your dream life (i.e., choose a mix of persona AND business goals for variety).
2. Choose the top 3-5 goals that you can make happen the fastest. When you know you can hit a goal quickly, it will help motivate you to stay focused on the other goals that might be a bit harder. Once you knock a few of these goals off your list, you can even replace them with other goals.
3. Choose the top 3-5 goals that you know will make the biggest impact on getting you toward your dream life or business.
4. Choose the top 3-5 goals that feel most meaningful to you.

NOTE: Don't get rid of your goals list! Hang onto it, because you'll likely want to reference it later, and you can also pull from it as you tick goals off your list this year.

EXERCISE: Narrow down your goals into 3-5 major goals to work on over the next year. Use any or all of these charts to help you prioritize.

Top 3 Goals in Each Timeframe

1 YEAR:

3 YEARS:

5 YEARS:

10 YEARS:

Top 3-5 Fastest Goals

Top 3-5 Goals with Most Impact

Top 3-5 Goals with Most Meaning

EXERCISE: Choose 3-5 SHORT-TERM GOALS.

These goals will likely look like habits that will get you closer to your dream life or business or will be things that do not require multiple steps. For example: Drink 80oz of water every day, exercise 3x a week, meal prep on Sundays, etc.

3-5 Short Term Goals

Brainstorming Notes

STEP SIX: Chunk Down Your Big Dreams Into Small Steps & Realistic Timelines

Now that you have your goal priorities set, it's time to create that action plan! Depending on the size of the goal, it's often not enough to just declare a goal. Sometimes you need to break that goal down into more manageable chunks, so you know exactly what you need to do every day, week or month to reach your goal.

First, think about if you truly need a full year to complete the goal or make the 'dream' come alive. Go through each goal and ask if you can (or need) to take a year (or more!) to complete this goal. If the answer is yes, no problem. But if not, instead, ask what portion of the goal could you accomplish in 3 months? 1 month? Now set that as your new goal. These are your new short-term goals that will get you closer to your long-term goals.

For example: One of your big business dreams might be to get your first 1,000 email subscribers. If you're brand new to business, this is definitely something you can accomplish in a year. You'd need to gain about 83 new subscribers a month.

My 12 Month Life & Business Dream Planner

However, if one of your big business dreams is to have a support team of 10 team members and right now you have zero, you might not be able to hire all 10 in one year. Instead, you might make it a goal to hire your first VA in the first 3 months of the year, then another support person in another 3 months, etc.

Breaking each of these goals makes it easier to see what actions you need to achieve these goals. Even if you hire 4 team members in a year as opposed to the 10 you originally wrote down, that's still pushing you closer to your dream. And you'll know at the end of each month whether you've reached your 83 new subscribers and whether you need to push harder – by producing a freebie, summit, or webinar – to earn those subscribers.

In the second exercise, you'll break your short-term goals into actionable steps. What do you need to do to get from where you are to where you want to be for each goal?

Example: Get 100 email subscribers a month.

Steps: 1. Create email list

2. Create freebie

3. Create landing page for freebie

4. Write blog post linking to freebie

5. Create reusable social media posts about freebie

My 12 Month Life & Business Dream Planner

Example: Drink 80oz of water a day (while this is more like a routine or habit, there will still be steps you need to take to make it a reality)

Steps: 1. Buy an 80oz water bottle

2. Research and download app to remind you to drink water

3. Use habit tracker app or decide on how you're going to track how much/if you

drink enough each day

EXERCISE: Determine if you need to take a year (or more!) to complete each of your top goals.

Solidify Your Timeframes

GOAL #1:

LENGTH OF TIME NEEDED:

GOAL #2:

GOAL #3:

GOAL #4:

GOAL #5:

Exercise: Break your short-term goals into actionable steps.

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List the obvious so no steps get overlooked.

Action Steps

GOAL #1:

STEPS:

GOAL #2:

STEPS:

GOAL #3:

STEPS:

GOAL #4:

STEPS:

GOAL #5:

STEPS:

STEP SEVEN: Visualize & “Feel Into” Your Next Level for a Major Dose of Manifesting Magic

Visualization is another common way to dream about your future; except, instead of just dreaming about your life, you’re picturing yourself IN that life. You’re in your dream house in your dream location. You’re going about your day, working with your ideal clients, doing the work that brings joy to your heart.

When one visualizes daily – either as a part of meditation or on its own – you eventually begin to feel as if those dreams have already come true. You might notice that you handle yourself differently with clients, with more confidence. You might feel more grateful than you already do because you’ll feel at peace during your visualization exercise. You might also feel less desperate to gain new clients and instead serve your audience and clients from the heart. Make visualization one of your first micro habits and you’ll thank me later!

We’ve already discussed setting our goals into timeframes. Another way to split up your time is into quarters. The book, *The 12 Week Year* by Brian P. Moran and Michael Lennington showcases this practice for turning annual goals into 12 week or quarterly goals instead. Adopting this method, people focus on what’s most important in reaching a certain goal. You’re also working faster than if you spread everything out over 12-months, which helps prevent you from overthinking or procrastinating. This quarterly practice also allows you to ignore ancillary steps, thus making your process much more efficient.

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In this first exercise, break your year into quarters and decide which goals you want to reach in each quarter of the year. You certainly have the option of working on multiple goals at the same time but be careful not to overschedule yourself each quarter. Mark the completion date for each goal.

Very often quarterly goals (especially in business) will build upon each other, but this system works even if you have a habit-based goal, like drinking 100oz of water daily. Focus solely on that goal for a quarter and then replace that goal with a new one. After 12 weeks, you'll be drinking your water out of habit instead of needing a reminder, so that's easy to replace with a new habit-based goal.

Once you create a list of quarterly goals, create a new visualization practice.

- Review your list of goals for this particular quarter.
- Imagine what it will look, feel and be like to have achieved each goal on your list by [X] date.
- Imagine your entire day. What will you wake up and see, touch, do, feel, think? What will your day look like? Mentally go through your day as if everything you want to happen has already happened.
- Pay special attention to your thoughts. What are you **thinking** differently in your visualization? Maybe right now you think, "I'm not the type of person who drinks water" and in your visualization you think, "I always have water on hand. I love drinking water."!

Continue this visualization practice at least once per week and journal your thoughts after each session. Take note of how your thoughts change as you proceed through the quarter.

EXERCISE: Break down the year into quarters to set 12-week goals.

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These goals need to move more quickly so make your action steps efficient without leaving out important details.

Quarter 1 Goal(s)

GOAL #1:	GOAL #2:
STEPS:	STEPS:

Quarter 2 Goal(s)

GOAL #1:	GOAL #2:
STEPS:	STEPS:

Quarter 3 Goal(s)

GOAL #1:	GOAL #2:
STEPS:	STEPS:

Quarter 4 Goal(s)

GOAL #1:	GOAL #2:
STEPS:	STEPS:

EXERCISE: *Visualize how you'll feel at the end of each quarter.*

On the next page, use the space to journal how you feel NOW before the quarter begins and then throughout the next weeks after your visualization exercise.

Visualization Exercise: Quarter 1

My goals are:

When I visualize myself NOW, I feel:

After 4 weeks of visualization and working on my goals, I feel:

After 8 weeks of visualization and working on my goals, I feel:

After 12 weeks of visualization and working on my goals, I feel:

Visualization Exercise: Quarter 2

My goals are:

When I visualize myself NOW, I feel:

After 4 weeks of visualization and working on my goals, I feel:

After 8 weeks of visualization and working on my goals, I feel:

After 12 weeks of visualization and working on my goals, I feel:

Visualization Exercise: Quarter 3

My goals are:

When I visualize myself NOW, I feel:

After 4 weeks of visualization and working on my goals, I feel:

After 8 weeks of visualization and working on my goals, I feel:

After 12 weeks of visualization and working on my goals, I feel:

Visualization Exercise: Quarter 4

My goals are:

When I visualize myself NOW, I feel:

After 4 weeks of visualization and working on my goals, I feel:

After 8 weeks of visualization and working on my goals, I feel:

After 12 weeks of visualization and working on my goals, I feel:

STEP EIGHT: Start Bringing Your Dreams to Life, Starting Right Now!

Visualizing yourself in your dream life is powerful. See yourself in your power, living your dream, and with these goals already achieved. With daily visualization, you will soon start to act differently, carry yourself with more confidence, because you BELIEVE that you are powerful and capable of creating a dream life for yourself and your family.

Let's take your visualizations a bit further and break your short-term goals into even smaller chunks and actual tangible actions you can take daily. Have you read the book, Atomic Habits by James Clear? He describes how people get discouraged quickly when they're starting a new habit because they think they have to be ALL IN 100% of the time. For example, those who want to start a new exercise habit think they have to go to the gym for hours every day to reap those benefits.

In Atomic Habits, the premise is that beginning with small micro habits – such as doing 3 pushups daily – is much easier to handle, doesn't take much time, and over time will still lead to increased strength and more pushups. The same can be said about any habit, either personal or business.

- Want to increase your water intake? Start by drinking 16 oz every morning.
- Want to increase your business earnings? Connect with at least one prospect every day.
- Want to increase your name recognition? Focus on one marketing tactic daily.

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The joy of a daily micro habit is you train your brain and body to do the habit repeatedly, eliminating any anxiety or concern that you won't do it right. The more you practice this micro habit, the more comfortable you'll feel with it until it becomes a simple part of your daily life.

What can you do on a weekly or even daily basis to make each dream a reality?

In this last exercise you're breaking your goal's action steps down even further into weekly or daily actions. Answer the questions for each goal and then think of how to speed up your process. The slower you take doing the action steps – because your scared/nervous/anxious, etc. – the longer it will take to realize your dreams. You should be prepared to move at the speed of light to reach your dreams more quickly and these daily action steps will help.

EXERCISE: Break each goal down even further into weekly and daily action steps.

Goal:

Main Action Step	Weekly Action Step	Daily Action Step

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Goal:

Main Action Step	Weekly Action Step	Daily Action Step

Brainstorming Notes

