



Your Pragmatic Passion Success Plan (Book page 14 and 309)

For: _____ Date: _____

Dream Big. Keep It Real. Get It Done!

Today is the day! It's time to take charge of your life and put together your very own success plan. So, gather all of your notes and answers to the questions from the book and get ready to start creating, developing, and acting upon your blueprints for a joyful, fulfilling, and successful personal and professional life!

Developing your Pragmatic Passion Success Plan can be as detailed or as simple as you want to make it. My advice is to lean toward simplifying the plan. You will focus more on the details when you do your daily, monthly, and annual goal setting. Your life is constantly changing, evolving, and as a "Passioneer," it is always growing. It is impacted by internal and external factors and dependent on your stage of life (in school, at work, in a relationship, raising children, saving for college education, transitioning into retirement, etc.).

Your Success Plan must allow for flexibility, for unplanned events, and circumstances (both positive and negative) beyond your control. Focus on the fundamentals, the foundation, and the "Big Picture" when putting your plan together.

Therefore, you must commit to reviewing and updating this plan periodically. My recommendation is to do this quarterly with a more thorough "check-up" done annually.

NOTE: Put reminders in your calendar or on your smartphone such that your "You Review" is a recurring event.

Apply The 7 Pragmatic Passion Principles

Remember when you are creating your success plan for your life and career, you should keep The 7 Pragmatic Passion Principles in mind:

<u>P</u>urpose:	Does it support my values, passions, and purpose ?
<u>A</u>ttitude:	Will I have the proper attitude to commit to my goals and act on my purpose?
<u>S</u>acrifice:	Am I willing to make the sacrifices to persist and persevere along the way?
<u>S</u>ervant Leadership:	Does it serve others first and align with my servant leadership philosophy?
<u>I</u>nspiration:	Will I be inspired to pursue my purpose with passion to "Get It Done?"
<u>O</u>ptions:	Will I devote the time developing the best options , so I make informed choices?
<u>N</u>urture:	Will it nurture me to live a joyful, fulfilling, passionate, and purposeful life?



Your Success Plan should include:

- Personal Vision Statement and Worksheet
- Genie Test Results
- Career Map
- Financial Goals
- Job Qualities Worksheet
- Input from your Mentors and Coaches and your Pragmatic Passion Advisors Team
- Short Term, Medium Term, and Long-Term Goals

You are far more likely to achieve success across the spectrum of categories in your life when you spend intentional time on what matters most to you and how to go about living in a manner that will fulfill your most important passions and purpose.

Where are you Today? Paint Your Present Picture:

Look in the mirror and be pragmatically candid about where you are today. What do you like about your current life, what can be improved, and what must be eliminated to improve?

1. Purpose: What are my current values, passions, and **purpose**?

2. Attitude: My current **attitudes** towards my...

Life:

Relationship:

Family:

Education/Professional Development:

Work:

Physical Health:

Mental Health:

Hobbies/Activities:

3. Sacrifice: What am I willing to **sacrifice** to persist and persevere along the way?

4. Servant Leadership: Does it serve others first and align with my **servant leadership** philosophy?

5. Inspiration: Who **inspires me** to pursue my purpose with passion to “Get It Done?”

6. Options: Will I devote the time developing the best **options**, so I make informed choices?

7. Nurture: What will **nurture** me, so I may live a joyful, fulfilling, passionate, and purposeful life? What classes, webcasts, books, etc. will I take advantage of to continue to grow?

Your Desired Quality of Life:

Part I: The Genie Test

There are no right or wrong answers here. You are simply trying to see where your thoughts take you when you think impulsively, and then, intentionally.

A. If you could seriously have any three wishes for your life, besides world peace, what would they be? Write the first three things that come to mind, quickly!

1. _____
2. _____
3. _____

B. If you could have just one wish, what would it be? _____

C. Now go back and take your time. Think about your answers more deeply. If you could have any three wishes after some thought, what would they be and why?

1. _____
2. _____
3. _____

D. If you could have just one wish, what would it be and why? _____

Did you perhaps write something to do with getting a great job, making a lot of money, having fame, or essentially extrinsic things? Some examples of answers you may not have considered are:

- A fulfilling life, full of joy, happiness, and great relationships
- A passion for learning
- Great health
- Financial independence to allow for philanthropic giving
- The flexibility to allow volunteering for my favorite cause
- A life full of adventure

“My wish? To have a loving family and friends.” - Krishna Nadella, Americas Head of Sales for Portfolio Valuations, New Content, and Regulatory Solutions for Bloomberg L.P.



What matters most to Krishna? “That I am honest with myself and my wife and engaged with my children and to have healthy societal relationships. If I have that, I can do anything.”

The answers to all these exercises begin to provide you with information you need to make better choices for yourself in order to reach your goals. Consider changing your perspectives and focus more on **a higher purpose for your life**. I would bet in the long run you would be self-motivated to develop the necessary skills, the discipline, the determination, and the positive attitude to get that great job, make a substantial living, and perhaps gain a certain level of respect in your industry and community.

What quality of life do you desire?

Proximity to family and friends or other support networks (more important when you start a family).

Geographic Location - The median climate (temperature, precipitation, air quality, etc.)

Transportation options (Mass Transit, Cost of Commuting, Parking, etc.)

Healthcare Facilities and quality of medical care

Convenience for getting living supplies

Crime statistics

Proximity to outdoor activities and entertainment venues

Job availability

Quality of Education for your children

Personal and Professional Development availability

Entertainment options (Theatres, Concerts, Clubs, Sporting events, etc.)

Volunteer opportunities (Charities, civic groups, political organizations, religious organizations, etc.)

Types and availability of options to satisfy your spiritual needs



Pragmatic Passion Job Qualities Worksheet

Name _____ Date _____

1. Job Categories – Rank each one: 1-10 (1-not interested, 10-most desirable)

Academic/Education: _____ Business/Management: _____ Communications: _____
 Construction/Design: _____ Energy: _____ Food/Beverage: _____
 Healthcare/Health Sciences: _____ Law Enforcement/Government: _____
 Manufacturing: _____ Human Services: _____ Science/Engineering: _____
 Skilled Trades : _____ Sports/Entertainment: _____ Technology: _____

2. Salary Target:

Starting: \$ _____ Age 30: \$ _____ Age 40: \$ _____
 Age 50: \$ _____ Age 60: \$ _____ Age 65: \$ _____

3. Desire to be seen as:

- Professional
- Expert in field
- Mastery of craft
- Living a balanced life
- Not important

4. Your Job's Benefits/Culture/Psychic Income (Check all that matter):

- | | |
|---|---|
| <input type="checkbox"/> Work from home/remotely | <input type="checkbox"/> Work autonomously |
| <input type="checkbox"/> Work 9-5 and get home | <input type="checkbox"/> Work in a team setting |
| <input type="checkbox"/> Repetitive tasks | <input type="checkbox"/> Work indoors |
| <input type="checkbox"/> Varied work/interesting work | <input type="checkbox"/> Work outdoors |
| <input type="checkbox"/> Exciting/risk taking work | <input type="checkbox"/> Geography (Country, Region, State) |
| <input type="checkbox"/> Continuous learning as part of the job | <input type="checkbox"/> Work in an urban setting |
| <input type="checkbox"/> Allows for creativity/innovation | <input type="checkbox"/> Work in a suburban setting |
| <input type="checkbox"/> Travel is required | <input type="checkbox"/> Work in a rural setting |
| <input type="checkbox"/> No travel is required | <input type="checkbox"/> Work in a private office |
| <input type="checkbox"/> Job security is a priority | <input type="checkbox"/> Work in an open floor plan |
| <input type="checkbox"/> Healthcare Benefits | <input type="checkbox"/> Work in a cubicle |
| <input type="checkbox"/> Recognized by peers/others | <input type="checkbox"/> Bonus structure is important |
| <input type="checkbox"/> Challenging type of work | <input type="checkbox"/> Stock options/equity opportunities |
| <input type="checkbox"/> Work/Life integration is a priority | <input type="checkbox"/> Wellness Center/Fitness membership |
| <input type="checkbox"/> Being actively supervised | <input type="checkbox"/> Opportunity to advance |

5. Level of Responsibility:

- Professional – Supervise tasks, not people
- Supervisor – One department/function
- Senior Manager – Multi departments
- Executive
- Owner/Entrepreneur
- None

6. Education: (Pick Highest level desired)

- On The Job Training
- Technical Training/Trade Certification
- Associate of Arts/ Associate of Science degree
- Bachelor of Science/ Bachelor of Arts degree
- Master of Arts/Master of Science/Master of Business Administration degree
- PhD/EdD/Law Degree/Medical Degree/Veterinarian Degree/etc.
- Post Doc/Professional Certification/Professional Licences (PE, RODC, CPA)

7. List your top 5 priorities you **MUST HAVE** (non-negotiables) in a job:

Examples: Flexibility of hours, make a difference and see outcomes, helping people to reach potential, personal space, work outdoors, travel

Must Have:

8. List your top 5 issues you **MUST NOT HAVE** (non-starters) in a job:

Examples: Bosses that are JERKS, high level statistics/math, Prefer not to work with politicians, high pressure sales, working in a cubicle



9. In your own words describe your ideal life at 25/40/55/70 years of age:

10. If you were writing the “perfect” job description for you, right now, at this stage of your life, what would it look? Reminder: KEEP IT REAL!



Financial Planning (for adults)

Are all your personal documents accounted for and easily located?

1. Have you created a personal and/or family budget?
2. Are you practicing delayed gratification? Are you spending your hard-earned money on frivolous “stuff?”
3. Are you living a “status lifestyle,” What can you simplify, cut back, or cut out?
4. Do you have a credible, certified financial planner? Pay by the hour or fee based?
5. Do you “pay yourself first.” Direct deposit a % of your paycheck to savings and investments?
6. Do you have 3-6 months of monthly expenses in emergency savings?
7. Are you putting away what your company will match in your retirement programs?
8. Have you created a will, researched and purchased the right types of insurance, and have all your personal records and documents in a safe place?
9. Have you put money in investments that you fully understand until you learn more about financial markets?
10. Are you avoiding “get rich quick” schemes and buying lottery tickets? Neither really work.



Pragmatic Passion Personal Vision Statement (Updated)

Name: _____ Signature: _____ Date: _____

Values:

Interests:

Skills & Knowledge:

Natural Talents/What You Do Well:

What Others Say You Do Well:



Concerns/Areas For Improvement:

Passions:

Causes:

Quality Of Life Desired:

Stage Of Life:

Personal Vision Statement:



YOUR GOALS

Short Term (ST), Medium Term (MT), and Long-Term Goals (LT)

“A goal is a dream with a deadline! Get into the ACTION habit!”

– Dr. David Schwartz, Author of *The Magic of Thinking Big*

Place these where you will easily see them every day.

“A posted goal seen daily will be acted upon more often.”

Name (print): _____ Signature: _____

Mentor: _____ Mentor Signature: _____

Date: _____

Work/Academic Goals: (BE AS SPECIFIC AS POSSIBLE) Mark an ST, MT, or LT next to each goal)



Personal/Family Financial Goals: (BE AS SPECIFIC AS POSSIBLE)

Personal/Professional Development Goals: (BE AS SPECIFIC AS POSSIBLE)



Activity/Athletic Goals: (BE AS SPECIFIC AS POSSIBLE)

Spiritual/Mindfulness Goals: (BE AS SPECIFIC AS POSSIBLE)

“Dreams without goals are just dreams.”

–Denzel Washington, Academy Award Winner and Professional Speaker