

# The Annual Crossover

Building Upon a  
Bigger Future  
than the Past

# Annual Goals Inventory Sheet

## Annual Crossover Process

Reflect on the meaning of this year that just past. Please marinate on these questions and write down your reflections. When you do this, you begin to acknowledge and appreciate (gratitude) what was brought to you, what shaped you, changed you this year, and see bridges from these into the new year.

1 What inspired you the most this year?

2 What challenged you to go beyond the familiar this year?

3 What amazed you or surprised you most this year?

4 What touched you or moved you most this year?

5 What new teachers or special people came into your life this year?

# Annual Goals Inventory Sheet

## Annual Crossover Process

Reflect on the meaning of this year that just past. Please marinate on these questions and write down your reflections. When you do this, you begin to acknowledge and appreciate (gratitude) what was brought to you, what shaped you, changed you this year, and see bridges from these into the new year.

6

What did you learn most about yourself this year?

7

As you consider these first 6 questions, what are your latest convictions? (What you're convinced of)?

8

Like question 7, what is your life purpose, what are you in service to most, today?

9

And from questions 7 and 8, what now are your core values, what you stand for and would never compromise?

10

And the grand finale question: If you were looking back from 95 years old on this time, what would you tell yourself about playing the game of life and business today? What advice would you be giving you at this point on your personal/professional journey?

Take inventory of your past and present goals. Taking on anything new isn't likely to happen if you've got a pileup of backlogged goals that are still unmet. Then add any new and emerging goals that are from the future you want to create. As a key piece to your thinking on this, consider where you're shooting three years out, and what you need to line up this next year to move you toward that farther terminal point.

Let's take a measurement of this year's goals inventory. Write down your answers below Please write down 10 of your best accomplishments you had this last year, then next to each ask yourself, why did it happen, then "Ok, what's next to further progress?"

	Goal	Reason why	Further progress - What's next?
1	.....	.....	.....
2	.....	.....	.....
3	.....	.....	.....
4	.....	.....	.....
5	.....	.....	.....
6	.....	.....	.....
7	.....	.....	.....
8	.....	.....	.....
9	.....	.....	.....
10	.....	.....	.....

# The Core Four

## Life Plan

- Health, Business, Relationships, Personal Finance, Quality of Life
- Time, Money, Connection, Purpose

## Business Plan

- Habits, Support, Relationships, Value Model
- Control Systems
- Lead Generation, Conversaion, Optimization, Retention, Propagation

## Business Vision

- Mission
- Values
- Vivid Description
- BHAGS

## Priority Management

- Thematic Time Blocking
- Weekly Milk Route
- Project List
- Daily 6
- Distraction Insulation
- Focusing Unique Ability

To balance your life, these are the core four elements that organize all your decisions, actions, and communications today. As you examine what's in each, take inventory of how congruent your current organizing framework is by comparison. Here are guidelines in dialing in each area this year:

- 1 Think in terms of final desired outcomes.
- 2 Know your current reality in relationship to them.
- 3 That will form structural tension, the best dynamic for real and lasting change.
- 4 From that, create an action plan with due dates.
- 5 Don't have too many "resolutions" because that will lead to overwhelm.
- 6 Choose a few that can be created quickly, within the first few weeks so you can generate some momentum.
- 7 Manage the process directly.
- 8 Learn, adjust, learn, adjust, learn as you engage in the process.
- 9 Don't take it personally, this is not about you but about the end results you are creating.
- 10 Build foundation. The more you create, the more you are able to create.



Let's take inventory of your active goals you're pursuing in the following areas:

What results do you want to create professionally within 1 YR. from today?

Your Biggest Opportunities (What do you want to be able to have?):

- 1 .....
- 2 .....
- 3 .....

Your Best Internal Processes (What impact areas and systems matter most to optimize for quality control and value creation to the customer?):

- 1 .....
- 2 .....
- 3 .....

Your Best Marketing and Sales systems (what impact areas or systems will most increase growth):

- 1 .....
- 2 .....
- 3 .....

Your Ideal Relationships (types of customers, alliances, behaviors, value creation, roles, niche?):

- 1 .....
- 2 .....
- 3 .....

Your Best Skills (What superior skills have you developed that motivate you?):

- 1 .....
- 2 .....
- 3 .....

Work Habits (more of; less of):

- 1 .....
- 2 .....
- 3 .....

\$ Productivity \$ (Revenue, Net Income, Market Share, Growth, Industry Comparison, and Competitive Edge):

- 1 .....
- 2 .....
- 3 .....

Qualities composing your Organization (Team Spirit, Buy In, Style, Atmosphere, Values, Behavior, How good/bad times are handled, how customer/competition sees you):

- 1 .....
- 2 .....
- 3 .....

Your time. What will you focus your time and attention on most?

- 1 .....
- 2 .....
- 3 .....

(con't) What results do you want to create professionally within 1 YR. from today?

Community (Contribution, Significance, Charity, Voluntary Efforts):

- 1 .....
- 2 .....
- 3 .....

Team (New Hires, Support Structure, and Items to Delegate, Organization and Infrastructure):

- 1 .....
- 2 .....
- 3 .....

Sweeps (items/areas/people to eliminate, messes to clean up; purging):

- 1 .....
- 2 .....
- 3 .....

Sweeps (items/areas/people to eliminate, messes to clean up; purging):

- 1 .....
- 2 .....
- 3 .....

# Personal Goals

1 Year from today, whose the future “YOU” in the personal and professional dimensions of your life? Goals are benchmarks or targets that are measurable and facilitate dreams. Anything measured, is more likely to get accomplished. In this exercise, you’ll be planning your critical outcomes that matter enough to create 1 year from today. These don’t have to be realistic, they could be impossible, as long as they matter.

What results personally do you want to create within 1 year from today?

“Near and Close” Personal Goals (longings that you’d share only with those near and close to you):

- 1 .....
- 2 .....
- 3 .....

Family (marriage, kids, parent role, activities, friends):

- 1 .....
- 2 .....
- 3 .....

Free Days and Blue Sky time (qualities and quantities you want)?

- 1 .....
- 2 .....
- 3 .....

Personal Habits (more of; less of):

- 1 .....
- 2 .....
- 3 .....

Spiritual (Activities, Faith, Habits, Rituals, Awareness, Attunement)

- 1 .....
- 2 .....
- 3 .....



Personal Finance (saved wealth, risk level, net worth, investments, performance, ratios, and yields):

- 1 .....
- 2 .....
- 3 .....

Community (Contribution, Significance, Charity, Voluntary Efforts):

- 1 .....
- 2 .....
- 3 .....

Health (Fitness, Mental Fitness, Flexibility, Vigor, Capability, Waste Size, BMI, WHR, Resistance to illness):

- 1 .....
- 2 .....
- 3 .....

Fun and Leisure: (Travel, locations, vacations, free days, activities, enjoyment of life, adventure)

- 1 .....
- 2 .....
- 3 .....

Intellectual Development (con't education; reading; subjects of interest):

- 1 .....
- 2 .....
- 3 .....



# Personal Goals

	Fitness	Family	Finance	Faith	Friends
10-20 Year Goals					
3 Year Goals					
1 Year Goals					
Current Reality					
90 Days Priorities and Actions	Start	Start	Start	Start	Start
	Stop	Stop	Stop	Stop	Stop
	Continue	Continue	Continue	Continue	Continue
Weekly Rituals					

**Keys to Living by a Life Plan.** The most powerful tool of all you can give yourself is a solid life plan, accounting for what's most important to you, writing down results and action steps, and time activating steps to follow through. Again the purpose of the life plan is to avoid neglect of areas that count for you in spite of your financial and business success. Going through life bankrupt in your physical fitness, marriage, relationship with kids and spiritual component, is not a good definition for success.

Success means winning in all areas, creating what truly matters to you as a whole, not just the parts.

The process begins with a series of steps:

1

Schedule a whole day to work on the rest of your life. Get out knowledge working environment, remove yourself from email, paper and the phone, and go to a place where you can tap your thinking with depth.

2

Build a Dream Conversion Journal. Get a notebook with 10-15 dividers, you'll most likely only use 8 or 9 from our experience with clients.

3

Make a list of all the areas you're going to account for in your life. We suggest you begin with the 5 F's. You may want to add a few other areas such as "field" to define what you want in your field of expertise or know-how.

4

Use the life plan builder to build a line of sight from your big picture vision to the goals 1-3 years out, to position your 90 day priorities. Consider what to start, stop, and/or continue.

5

Once you've created a set of outcomes, defined current reality and articulated action steps with dates and deadlines, you're ready to help yourself follow it through.

6

Now, go to your calendar and carve out a "perfect week". Schedule the strategies necessary in your life planning accounts, For example if a strategy is a gym workout, schedule it as a high priority appointment, like it's a million dollar business meeting with yourself. Schedule soccer practices, any classes or special activities in your life plan. Schedule any spiritual roles or activities that support your life plan outcome(s). The point here is that you begin to invest in the areas important to you know, so you've got all the steam for the rest. Burning out in a profitable business is the exact opposite of be profitable, it's being regretful.

7

Review your life plan once every day, this is essential. If you're truly going to live it, get with it every day, see how you're doing. Immerse yourself in your life plan.

8

Adjust it. You may find that you didn't need 15 categories in your dream conversion journal, you can cluster it or fuse areas, or even omit any that do not matter as you considered originally. A great part of this process is learning and adjusting into your life plan until it's just right.

9

Share your life plan with others. Share it with your team.