



"You've got to think about the big things while you're doing the small things, so that all the small things go in the right direction."

Alvin Toffler



How to Turn Your Dreams Into Reality By Creating a Personal Master Plan

If you're interested in the PMBA, I'm willing to bet you have some very lofty goals for yourself. Developing a Personal Master Plan is the best way I've found to ensure you achieve your most important objectives.

A "Personal Master Plan" is a short document that clearly states your goals for the next three years, then systematically breaks down those goals into positive, immediate, concrete, and specific next actions for you to accomplish this week.

Writing down your goals and having a clear plan of action is critically important if you want to make the best use of your finite time and energy. The process detailed in this lesson is the most

effective means I've found to identify what I really want and focus on what really matters.

To help you identify what you want most, I've created a simple (and fun) four-phase process that will get your creative juices flowing about what you want to accomplish, then make it absolutely clear what's really most important to you, allowing you to focus on the projects that will make the largest positive difference in your life. After creating your Master Plan, you'll be amazed at how clearly you'll be able to visualize what you want to achieve and what you need to do *right now* to move forward.

This guide combines techniques I've learned from books like *Ready for Anything*, *The Four-Hour Workweek*, *The Simplicity Survival Handbook*, *Cut to the Chase*, and *The 80/20 Principle*, as well as advice I've received from my many mentors and colleagues. I hope you find it enjoyable and useful.

Phase #1: Dreaming on Paper

Mind Dump, Then Clarify

“I always wanted to be somebody. I should have been more specific.” Lily Tomlin

Step 1: Gather Materials

For this exercise, you’ll need at least 5 sheets of paper, your favorite writing instrument, and at least 1 hour of uninterrupted personal time. Label the papers as follows:

Page 1 = Health / Fitness

Page 2 = Relationships

Page 3 = Skills / Personal Growth

Page 4 = Wealth / Career

Page 5 = Enjoyment

Step 2: Brainstorm / Mind Dump

Pick up one of the papers, consider the topic area, and ask yourself the following question:

“What are all of the things I might want to accomplish in this area within the next three years?”

Write down *everything* that comes to mind - avoid self-editing as much as possible. Think and write as fast as you can, and fill all five pieces of paper with as many ideas as you can muster.

We’re using three years as a proxy for the “foreseeable future.” The world changes quickly, but three years is a good time-period to consider: it’s short enough to be able to visualize clearly, but long enough for you to be able to make drastic changes and accomplish major goals.

Step 3: Apply the “Five-Fold Why”

During the first examination of the results of your mind dump, you’re going to apply a technique every child has mastered: asking “Why?” Look at each goal you’ve recorded and ask yourself:

“Why do I really want this?”

When you think of an answer, ask yourself the question again. You should ask yourself this question at least five times, or until you absolutely can’t come up with another answer. When you’ve reached this point, ask yourself:

“Is the original wording of this goal the best way to capture the essence of what I actually want?”

The point of this step is to help you question your assumptions and focus on the true intent of each of your goals instead of getting caught up in arbitrary specifics or social conditioning.

For example, many people have the goal of earning a large sum of money. (Let’s use \$10 million.) After asking why, they often find that it’s *freedom* they really want, and they don’t need \$10 million to achieve their true objective. A better goal might be to find a way to earn enough income to meet their needs using a minimum of time and energy, thereby leaving themselves free to do what they like with their increased unstructured time.

Step 3: Check for PICS

Ensure your goals are well-formed and clear. Ask yourself:

“Is this goal Positive, Immediate, Concrete, and Specific?”

Positive: “I want to exercise every day.”
NOT: “I want to stop sitting on the couch all day.”

Immediate: “I want to land a lead role in a movie.”
NOT: “I want to become a famous actor.”

Concrete: “I want to live in Russia for at least a month.”
NOT: “I want to travel the world.”

Specific: “I want to earn at least \$8,000 each month.”
NOT: “I want to make a lot of money.”

Step 4: Is it EAE?

This step ensures you’re stretching yourself and engaging your emotions appropriately in forming your goals. Ask yourself:

“Is this goal Extremely Ambitious and Exciting?”

Most of us are far too conservative when it comes to setting goals. If your goal doesn’t push your limits and make you *strongly* anticipate accomplishing it, reword it until it does.

An Example of a Well-Formed Goal

“Within the next three years, I want to read all 70 books in the Personal MBA recommended reading list at a rate of 1 book every two weeks. This goal will allow me to increase my knowledge of business while starting my own company, as well as help me develop confidence in my skills as an entrepreneur.”

Phase #2: Focusing on What's Important

Making Conscious Choices

“You must always work not just within but below your means. If you can handle three elements, handle only two. If you can handle ten, then handle five. In that way the ones you do handle, you handle with more ease and mastery, and you create a feeling of strength in reserve.” Pablo Picasso

Focusing Your Efforts

As tempting as it is to try to accomplish everything on your lists all at once, it's far more productive to consciously restrain yourself so that you can focus your time, energy, and attention on just a few things at a time.

When you divide your efforts and attention across several projects at a time, it's difficult to achieve the critical mass of thought and action necessary to actually accomplish what you set out to achieve. By temporarily eliminating non-critical projects, you're freeing yourself to focus on the small core of projects that are most important to you *right now*, allowing you to accomplish more with less effort.

The goal of this phase of the Master Planning process is to reduce your list of active goals to five: one health / fitness goal, one relationship goal, one skill / personal growth goal, one wealth / career goal, and one enjoyment goal. By focusing on these five goals, you'll enjoy the benefits of a productive, sustainable, and balanced life.

Choosing What's Important

Pick up one of your goal lists and ask yourself the following question:

“If I could only accomplish half of these things in the next three years, which ones would I choose to accomplish?”

Cross out the goals that don't make the cut.

Recursive Elimination

Apply the same selection process to your remaining goals:

“If I could only accomplish half of these things in the next three years, which would I choose?”

Again, cross out all of the goals that don't make the cut. Continue asking this question until you have *one* goal remaining. Then move on to the next list.

Build Your Someday / Maybe List

Don't completely discard the goals you decide aren't important enough to focus on right now: they're still useful, since they represent things you'd like to do at some point in your life. Place these items on a “Someday / Maybe” List so you can easily refer to them at a later date.

Finalizing Your Most Important Goals

At the end of this phase, you'll have five goals you've identified as the accomplishment that will make the largest positive difference in your life. These goals will form the basis for the next phase in the process: creating an action plan that will help you achieve them quickly.

Self-Check: How Do You Feel?

After making these edits, check your current emotional state - how do you feel? If you're excited, happy, and relaxed, you're on the right track, and the goals you have are well-formed. If you're feeling overwhelmed, depressed, anxious, or apathetic, re-examine your choices before moving onto the next phase.

“Know how to choose. Most things in life depend on it. You need good taste and an upright judgement; intelligence and application are not enough. There is no perfection without discernment and selection.” Baltasar Gracian



Phase #3: What Can I Do Right Now?

Translation to Immediate Actions

“If you have built castles in the air, your work need not be lost; that is where they should be. Now put foundations under them.”

Henry David Thoreau

Now that you’ve identified your single most important goal in each of the five areas, it’s time to use them to build an action plan you can use to decide what to spend time doing right now. The process is simple: we’re going to break down your long-term goals into manageable steps you can accomplish immediately.

Step 1: This Year

For each of the five goals, create a *single* goal that expresses the most important thing you can do to move yourself towards the accomplishment of the three-year goal in the coming year.

Example Three-Year Goal: “Within the next three years, I want to create a cash-flow positive business that allows me to earn at least \$10,000 each month.”

Example One-Year Goal: “I want to launch my online waffle iron store and generate at least \$3,000 in profit per month before January 1, 2009.”

Step 2: This Month

Once you know what you need to accomplish this year, define what you need to accomplish this month to keep you on track:

Example One-Year Goal: “I want to launch my online waffle iron store and generate at least \$3,000 in profit per month before January 1, 2009.”

Example Monthly Goal: “I will launch the new WaffleMaster 5000 via an online and direct marketing campaign by February, 2008.”

Step 3: This Week

Once you know what you need to accomplish this month, define what you need to accomplish this week:

Example Monthly Goal: “ I will launch the new WaffleMaster 5000 via an online direct marketing campaign by February, 2008.”

Example Weekly Goal: “This week, I will develop three drafts of sales copy for the WaffleMaster 5000 and pre-test response rates using PPC advertising.”

Test Your Goals

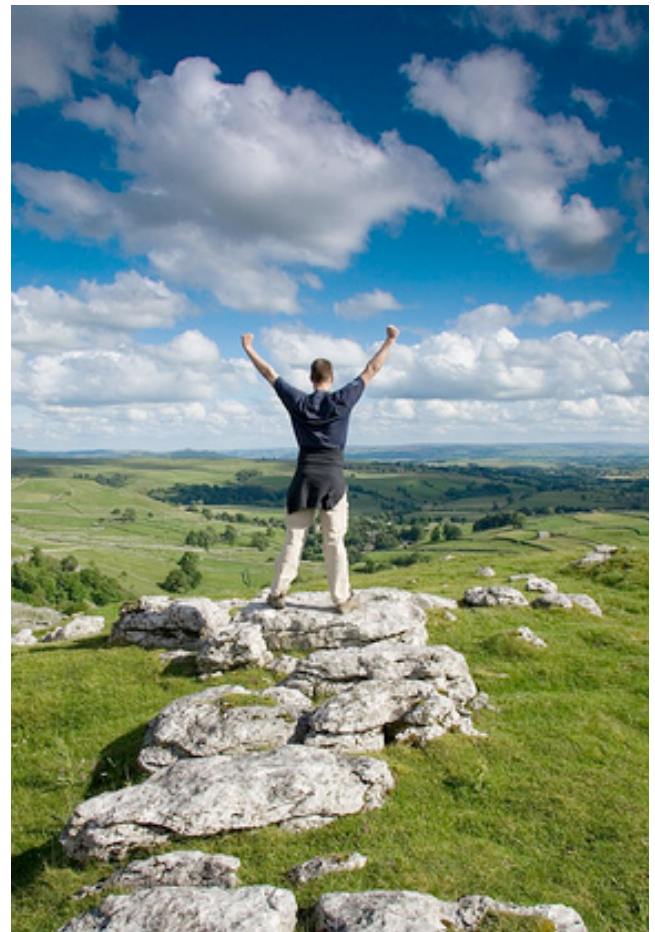
Examine your yearly, monthly, and weekly goals to ensure they pass the Five-Fold Why, PICS, and EAE tests.

Once all of your goals have passed, review the entire list and check your emotional state. Are you excited to get started? If not, re-examine your intermediate goals and adjust as necessary until you find yourself itching stop writing and start making progress.

Review Your Master Plan Regularly

When all of your goals have been established, it’s important to be able to review them readily and update them as necessary. I review my Master Plan every day, and update it regularly as part of my standard weekly review process, which I schedule on Friday afternoons.

On the next page, I’ll introduce you to a very useful online tool I’m using to manage my Personal Master Plan.





Managing your Personal Master Plan with Backpack

Backpack is a web-based application designed for maintaining notes, lists, and files. Its flexibility makes it ideal for keeping your Personal Master Plan in front of you on a daily basis.

You can create a free account by visiting <http://backpackit.com>. For a short tutorial on how to use Backpack, click here.

My Personal Master Plan

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Most Important Tasks for the Week of January 21

Wild & Wonderful Waffles

- Develop three drafts of sales copy for the WaffleMaster 5000
- Test sales copy via a small PPC campaign to measure response rates
- Update 1-800 number on website

[Add an item](#)

Goals for January, 2008

Launch the WaffleMaster 5000

I will launch the new WaffleMaster 5000 via an online and direct marketing campaign by February, 2008.

Goals for 2008

Establish and Market Wild & Wonderful Waffles.com

I want to launch my online waffle iron store and generate at least \$3,000 in profit per month before January 1, 2009.

Three-Year Goals (2011)

Keeping Your Master Plan Top-of-Mind Using Backpack to Track Your Progress

Create Your Master Plan Page

After you create your free account, dedicate a page to your Personal Master Plan. I use the "home" page, which automatically makes it the first page I see when I log into my account. I highly recommend that you do the same.

Use Dividers to Create Weekly, Monthly, Yearly, and 3-Year Sections

The first thing to do is create page dividers that separate your goals into 3 Year, 1 Year, This Month, and This Week sections. I keep the "This Week" section at the top, and the "3-Year" Section at the bottom.

Use One Note Per Goal

Under each divider, create a note for each goal. The title should contain your goal, and the notes area should contain your detailed reasons for choosing the goal.

Make the Master Plan Your Home

For best results, make your Master Plan your web browser's home page at home and at work, so you look at it every day.

Print it Out

Backpack's print output is very attractive. Print out your Master Plan (double-sided is best) and take it with you.

Getting the Most From Your Master Plan

Tips & Tricks

Tip #1: Morning Routine

Make reviewing your Personal Master Plan a part of your daily routine. I review my plan every day, immediately after exercising, showering, and eating breakfast.

By reviewing your plan every day, you'll strongly reinforce what you want to accomplish, making it easier to stay motivated and on track. Establishing this habit is critical.

Tip #2: Most Important Tasks

Immediately after reviewing your Master Plan in the morning, write out the two or three most important tasks for you to accomplish that day, then commit to completing them by 11:00 am, before checking e-mail or doing other less important tasks.

To plan your day, I highly recommend David Seah's "Emergent Task Planner," which you can download free at <http://davidseah.com/pceo/etp>. Filling out an ETP sheet each morning is a great way to plan your day's tasks and visualize how your time is being spent.

Tip #3: Weekly Review

In *Getting Things Done* and *Ready for Anything*, productivity guru David Allen recommends that you set aside a few hours every week to do a thorough review of all of your outstanding commitments. Using this time to review your Master Plan and make updates as necessary is an excellent way to ensure your immediate actions are leading to the fulfillment of your long-range goals.

Tip #4: Keep Your Someday / Maybe List in Backpack

Backpack is a handy place to keep lists and notes of all kinds, including the Someday / Maybe list of the items you eliminated in Phase 2. You can drag-and-drop items from one Backpack page onto another, so it's easy to add a new goal to your Master Plan after you've accomplished one of the primary goals on your list.

Next Actions

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