**THE DEEP DIVE**

*PREPARATION AND PLANNING DOCUMENT*

Please complete this document as preparation for our WPO Deep Dive at our Retreat. You will share a synopsis of your reflections using the PowerPoint template provided. Most importantly, you will identify those areas and goals for which you would like your WPO Colleagues **to hold you accountable** and support you over the next year.

###### SUCCESSES AND DISAPPOINTMENTS

(Answer the first two questions quickly – NO THINKING - write whatever comes into your mind.)

I. What did I accomplish last year?

II. What were my biggest disappointments?

1. What have I learned from these experiences?

When you have completed writing all that you have learned (or are still learning) select your **top three lessons**. State them as clear instructions to yourself. Start each with a verb and make it short and memorable. (Examples: *Stay Focused. Do It Now. Ask for Help.* )

**1.**

**2.**

**3.**

| BUSINESS SYNOPSIS – MY RESULTS & STRATEGIES | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Prior prior year Actual** | **%** | **Prior Year Actual** | **%** | **Current Year Actual** | **%** | **Next Year Plan** | **%** |
| **Revenues** |  |  |  |  |  |  |  |  |
| **Gross Profit** |  |  |  |  |  |  |  |  |
| **Net Profit** |  |  |  |  |  |  |  |  |
| **Assets** |  |  |  |  |  |  |  |  |
| **Liabilities** |  |  |  |  |  |  |  |  |
| **Total Debt** |  |  |  |  |  |  |  |  |
| **# Employees**  **Full-time /**  **Part time** | **FT:**  **PT:** |  | **FT:**  **PT:** |  | **FT:**  **PT:** |  |  |  |

What significant aspects (if any) of your business are NOT captured by these numbers?

What patterns do you see?

**My Exit Strategy:**

**Growth Plans:**

My growth strategy for the future is: *(e.g. geographical expansion, new services, acquisitions, etc.)*

The biggest obstacles to achieving this are:

|  |  |  |  |
| --- | --- | --- | --- |
| PERSONAL AND FAMILY – A SNAPSHOT | | | |
|  | This is how I currently spend my time. | I rate this experience : **Excellent**  **Good**  **Average**  **Poor** | I want this area of my life to:  **increase (+)**  **decrease (-)**  **stay the same (=)** |
| Company/Work | % |  |  |
| Spouse/Sig Other | % |  |  |
| Children/Family | % |  |  |
| Leisure | % |  |  |
| Personal Health | % |  |  |
| Personal Growth | % |  |  |
| Personal Finance | % |  |  |
| Spirituality | % |  |  |
| Friendships | % |  |  |
|  | 100 % |  |  |
| Date, location, and length of last vacation: | | Length of last vacation: | |
| Plans for location and length of next vacation: | | | |
| Hours of sleep I consistently get each night: | | | |
| Describe your exercise pattern / routine: | | | |
| I would rate my current state of health as: | | | |
| What one thing could I do to improve/maintain my health at optimal level? | | | |
| What one thing limits me from doing that one thing to improve/maintain my health? | | | |

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| CORE VALUES |

Review the list of values, beliefs, and characteristics listed below. Circle the 10 – 15 words that are MOST IMPORTANT to you.

Accomplishment

Achievement

Adventure

Affection

Affectionate

Affiliation

Ambition

Assisting Others

Authority

Autonomy

Beauty

Belief

Belonging

Broad-mindedness

Caring

Challenge

Cheerfulness

Clarity

Collaboration

Companionship

Competent

Competitiveness

Contribution to Others

Conformity

Contentedness

Control

Cooperation

Courage

Courteousness

Creativity

Dependability

Discipline

Economic Security

Effectiveness

Equality

Exciting Life

Fame

Family Happiness

Family Security

Forgiving

Free Choice

Freedom

Friendship

Fun

Genuineness

Goals

Happiness

Health

Helpfulness

Honesty

Independence

Improving Society

Innovativeness

Integrity

Intellect

Involvement

Imagination

Joy

Leisure

Logic

Love

Loving

Mature Love

National Security

Nature

Nurturing

Obedience

Order

Peace

Personal Development

Pleasure

Politeness

Power

Pride

Rationality

Recognition

Reliable

Religion

Respect

Responsibility

Restrained

Salvation

Self-control

Self-reliance

Self-respect

Sincerity

Spirituality

Stability

Status

Success

Symbolism

Taking Risks

Teamwork

Tidiness

Tenderness

Tranquility

Wealth

Winning

Wisdom

Others…

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From the list of core values you selected, identify the five most important values, write them below, and prioritize them so your highest-ranking value is listed first.








If you are having difficulty in selecting only five things, you might use the following prompts to guide you.

* Which values are most important as guiding principles in my life?
* If this particular value were totally absent from my life, would I be upset? Would I miss it?

|  |
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| **THE ROLES IN MY LIFE** |

We all have many roles in life – business owner, mother, sister, spouse, neighbor, board member, etc. **Consolidate your list of roles so that you have a MAXIMUM of eight.** Keep the list short to ensure that you give each role sufficient attention. Fewer than eight is fine. Integrate several roles under one title, if necessary.

**1.**

**2.**

**3.**

**4.**

**5.**

**6.**

**7.**

**8.**

**HE ROLES IN MY LIFE**

MY FOCUS FOR NEXT YEAR

Which role will be my major focus for the coming year? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why did I choose this role?

If I could put one challenge behind me, once and for all, what would it be?

In which role do I want to have a breakthrough?

If I were to have a significant “win” in one of my roles next year, in which role would I most want it and why did I pick that role?

What do I believe is the biggest impediment to my success and happiness right now?

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| --- | --- | --- |
| **MY GOALS** | | |
| **Role**  **(Business Owner, Mother, etc.)** | **SMART Goal \*** | Aligned w/ Core Values  (Y/N) |
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\*Remember to use the SMART’s format **(Specific, Measurable, Achievable, Relevant, Time-bounded, and Succinct)**

Which one goal that if achieved would have meaning and impact on your business that can be supported by WPO?

How can WPO help hold me accountable for achieving this goal?

How do I want my success to be measured?

How do I want to be reminded?

LIMITING BEHAVIORS

The next three questions are designed to help you discover how you’re limiting yourself by making assumptions about yourself that lead to failure rather than success. Start by answering these questions:

1. How Do I Limit Myself?
2. In Which Areas Am I NOT Achieving What I Want?
3. What Do I Say About Myself To Explain These Limitations to Myself and Others?

Look at the list above and choose the **one thing** that has the strongest limiting influence on you at this point in your work and life - the one you really buy into. **Select this one to stimulate your shift to a new and empowering focus.**

STRENGTHS AND RESOURCES

The most effective approach to change is to be aware of the activities or behaviors that are not working – but to focus **the most attention** on the new behaviors and habits we want to create. Your thoughts, feelings and actions will follow what you focus on. Choose to focus on the desired future and the positive actions **you** will take to create it.

Key strengths I can capitalize upon to achieve my goals and/or overcome barriers:

Key resources that I can leverage for support:

**Pathways to change:**

1. **STOP** doing the thing(s) that is not working
2. **START** doing something else (with the intention of creating a different outcome)
3. **CONTINUE** doing the things that work

**MY ACTION PLAN**

One or two behaviors I commit to **STOP** :



One or two behaviors I commit to **START** :



One or two behaviors I commit to **CONTINUE** :