

# LIFE PLAN

## Movement Mentoring

### An Introduction

We're going to take all the things we've learned in the mentoring process and wrap them into a comprehensive Life Plan that is designed to help you pursue an intentional, purposeful life without regrets. John Maxwell says, "All leadership begins with self-leadership," so let's wrap up the process with some self-leadership by creating a Life Plan that will help you live abundant, faithful, and fruitful lives.

**When we began the mentoring process, we mentioned 3 possible outcomes:**

**1. Deeper faith, hope, & love:** we trust that all of you have a deeper faith, hope, and love as a result of the mentoring process. In fact, some groups may stay together and continue the journey and multiply other groups by telling them about the rich experience you are having.

**2. Gather:** some of you may not be quite ready to lead a mentoring group, but you can gather some teammates and friends to go through it with you.

**3. Mentor:** the goal is to multiply the love of God and the friendship of God in others through multiplying new mentoring groups.

As you build your life plan, consider what your mentoring group is going to do and how you can personally multiply the blessing you have received in the lives of others.

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# Life Plan: My Legacy [1]

## How do you want to be remembered?

**Purpose:** To look at your life now and begin building your life around how you want to be remembered in the end.

**Step 1:** Print out Your Legacy form, which is located at the end of this training session.

**Step 2:** Find a quiet place where you won't be interrupted.

**Step 3:** Think about your life now and how you may be perceived by your spouse, children, parents, and colleagues.

**Step 4:** Imagine you are at your own funeral. Your family, friends, and colleagues are all there. Think of what you want them to say about you and write your thoughts on the Legacy form.

**Step 5:** Consider what changes you need to make to become the person you want to be remembered as. Make these changes SMART goals.

**Step 6:** Write these changes down, and they will help form your 12-week Year Life Plan SMART Goals.

**Step 7:** Record these SMART goals on the form entitled 12-week Life Plan SMART Goals (see the form at the end of this training session).

“Carve your name on hearts, not tombstones. A legacy is etched into the minds of others and the stories they share about you.” Shannon L. Adler, Author

**NEXT STEP:** Your Values

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[1] A special thanks to Chad Spencer and his company, DSG, for providing this Life Plan Booklet that we have contextualized for Movement Mentoring.

# YOUR LEGACY

LIFE MOMENTS MATTER



**How do you want to be remembered?**

**SPOUSE**

**KIDS**

**PARENTS**

**FRIENDS / COLLEAGUES**

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# Life Plan: My Values

## Your Home, Your Values, Your Culture

**Purpose:** To decide the values you want to help create the culture you desire in your home.

Our values shape the course of our lives, helping us determine what we purchase, what we pursue, and what we do. John Maxwell says, “We hold values, and our values hold us in times of crisis.” While businesses and churches often have values, very few families write them down and are intentionally cultivating their values.

**Step 1:** Print out the Family Values Form. You can find a copy of it at the end of this training session.

**Step 2:** Find a quiet place where you won't be interrupted.

**Step 3:** Using the Your Values Form as a launching pad, circle 5-10 words that describe how you want to define your home (feel free to add your own as well). These don't have to be what defines you and your family today—the key is to be aspirational. In an ideal way, how do you want to live your life and what do you want your home to be about?

**Step 4:** Since these are family values, the next step is to have others in your home—your spouse, roommates, children, etc.—complete the exercise in Step 3. Note: All homes have values, so this is not just for families, but for single people also.

**Step 5:** Together with your family, compare what you've circled and discuss what those words mean to you and why you chose them. Narrow down your collective ideas until you have a list of 3-5 values that resonate with all of you and that you all agree to pursue together.

**Step 6:** Take the list and think of creative ways to bring these values to life in your home. Here are some suggestions:

- Find a way to make them visible in your home so they aren't tucked away in a drawer or in a folder on your computer that no one will see (or remember).
  - You may want to make it into a frameable document and hang it somewhere in your home.
  - Or you could also create an artistic rendering of the values.
  - Or make wallet size cards—be creative and do what works for your house.
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# Life Plan: My Values

## Your Home, Your Values, Your Culture

**Step 7:** Continually teach, discuss, and encourage your family to live in such a way that reflects these values.

As an example, you may choose to use 5 words (joyful, encouraging, etc.) or you may choose phrases, as the CEO of DSG Furniture (Chad Spencer) did, such as...

- Love Big, Give Big
- Hear the Voice of God
- Forgive Always
- Work Hard

**NEXT STEP:** My Purpose Statement

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# YOUR VALUES

LIFE MOMENTS MATTER



Achievement	Discipline	Humor	Recognition
Adventure	Exercise	Influence	Relentlessness
Authenticity	Ease	Inner Harmony	Religion
Authority	Education	Joy	Reputation
Autonomy	Empathy	Justice	Respect
Balance	Fairness	Kindness	Responsibility
Beauty	Faith	Knowledge	Sacrifice
Bible	Fame	Leadership	Safety
Blessing	Fitness	Learning	Security
Boldness	Follow-through	Listen	Self-Respect
Bravery	Forgiveness	Love	Selflessness
Challenge	Friendship	Loyalty	Service
Citizenship	Fun	Meaningful Work	Spirituality
Communication	Generosity	Moments	Stability
Community	Giving	Openness	Status
Compassion	Growth	Optimism	Success
Competency	Happiness	Others	Travel
Competition	Hard work	Peace	Truth
Contribution	Health	Patience	Trust
Courage	Heart	Persistence	Trustworthiness
Creativity	Honesty	Pleasure	Unity
Curiosity	Honor	Poise	Wealth
Determination	Humility	Popularity	Wisdom



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# Life Plan: My Purpose

## Why Am I Here on Earth?

**Purpose:** To develop your Purpose Statement and utilize it to guide your decision-making process in life.

Purpose is one of the most important guiding factors for one's life, yet many people feel like they never discover what their purpose is. Why am I here? Living your purpose is the path to true joy in life.

**Step 1:** Print out the 12 Week Year Life Plan SMART Goals form.

**Step 2:** Find a quiet place where you won't be interrupted.

**Step 3:** At the top of the 12 Week Year Life Plan SMART GOALS Form, there is a blank in which to write your Purpose Statement.

**Step 4:** To develop your Purpose Statement, consider the following three questions about your life:

1. What do I really want out of life?
2. What do I want my life to stand for?
3. What am I uniquely created to do to make the world a better place?

**Step 5:** Based on your answer to those three questions, compose your Purpose Statement by answering, "What do I believe my purpose in life is?"

**Step 6:** Enter your Purpose Statement in the blank at the top of the 12 Week Year SMART Goals Life Plan.

**Step 7:** Make decisions about your goals in your 12 Week Year Smart Goals Life Plan based on your unique Purpose Statement.

Examples of purpose Statements:

- Chad Spencer, CEO of DSG, has a purpose statement that reads, "To live fully surrendered to Christ while loving and leading others to His goodness."
- Stephen Phelan, CPO of Movement Mortgage, has a purpose statement that reads, "To experience and multiply the love of Jesus."

**NEXT STEP:** Life Plan Development

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# Life Plan: LIFE PLAN SMART GOALS

## The Key to Intentional Living

**Purpose:** To decide and commit to what you want to accomplish in your life.

The Life Plan outlines six major areas of life—Faith, Finances, Family, Friends, Business, and Health. While these are general areas of our lives, you can adjust to meet your needs and goals. After all, it is your life. Your choices. Your actions. The sum total of your choices will lead to your legacy, so let's build your life and your legacy with faithful intentionality.

**Step 1:** Print out the 12 Week Year LIFE PLAN SMART Goals Form.

**Step 2:** Find a quiet place where you won't be interrupted.

**Step 3:** Enter your Purpose Statement. See: How to Create Your Purpose Statement.

**Step 4:** With your Family Values, Your Legacy, and Purpose Statement in mind, think about the upcoming quarter and decide on the SMART goals you will accomplish in the next 12 weeks. Do not think a year out because so much can change in a year's time—instead, think of a 12-week year (see book by Brian Moran) and set new goals every 12 weeks in each of the major areas of the Life Plan.

**Step 5:** Review your goals and make sure they are SMART goals—Specific, Measurable, Achievable, Relevant, and Timebound. Consider what may hinder you from achieving your goals and include any goals that will help you overcome these obstacles!

For example, instead of recording, "I will improve my relationship with my children," write down the ongoing action you will take to accomplish improving your relationship with your children, such as, "Each day, I will set aside 10 minutes to spend alone with Robin to discuss her day, her goals, and her accomplishments—I will use Facetime to connect when I am traveling."

**Step 6:** Share your Life Plan with your mentoring group and any others that can help you achieve your commitments and goals. You certainly should share your plan with those who are mentioned in your Life Plan. Ongoing, regular accountability is critical here. This will be a worthless exercise if this becomes another piece of paper that goes in a drawer somewhere or yet another file you create on your computer that you never look at. So, let us talk about accountability...

**NEXT STEP:** Accountability: Review the Accountability How-To Document

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MY PURPOSE: \_\_\_\_\_

**FAITH**

**FAMILY**

**FINANCE**

**FRIENDS**

**BUSINESS**

**HEALTH**

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# Life Plan: Accountability

## The Role of Accountability Partners in Your Life Plan

**Purpose:** To make sure you are accountable to living out your plan on a daily basis.

Together, we achieve more. It's been said, "If you want to go fast, go alone; if you want to go far, go together." We want you to go really far with your purpose in life, and for that you will need people to hold you accountable. Your mentoring group can function as the beginning point for accountability, and you can determine with your group who the appropriate people are to help you accomplish your life plan. You can decide whether you would like to share all (or part) of your life plan with your mentoring group based on sensitivity of the information.

**Step 1:** Complete all the steps of your Life Plan form.

**Step 2:** Share it with your mentoring group and come up with a rhythm within your group to hold one another accountable. We suggest at least two ongoing steps:

1. Review your life plan on the first week of each month in your mentoring group and pray for one another. You will not do an additional training session that day because the entire hour will be composed of discussing your Life Plan.
2. Share with your mentoring group who else you are going to share progress reports with (e.g. spouse, friend, parent, etc.) and how frequently.

**Step 3:** Prior to your monthly meeting with your mentoring group, review your Life Plan. Ideally, have a conversation with those impacted—spouse, children, family, coworkers, boss, etc.—to evaluate how you are doing in accomplishing your goals so that you can then share this update with your mentoring group and/or the people who are holding you accountable.

**Step 4:** Humility and Confidentiality. Sensitive information will be shared, so remember to participate in these meetings with humility and absolute confidentiality.

**Step 5:** In your monthly Life Plan Check-In meetings, here are some questions to consider:

- Celebrations: What wins are you experiencing?
  - Challenges: What challenges are you facing in accomplishing your Life Plan?
  - Course Corrections: Ask your group if they see any course corrections that you need to make and share with them any course corrections that you believe you need to make.
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# Life Plan: Accountability

## Sample Life Plans

### Faith

1. Go on a Mission Trip
2. Continue Mentoring Group
3. Spend time with Jesus daily

### Family

1. Teach Family Values
2. Regular Family Game Nights
3. 2 Connection trips with wife
4. 1-on-1 planned time with kids

### Business

1. 10% comp sales and hit budget
2. Develop playbooks for all leaders and top performers

### Finances

1. Increase giving by 5%
2. Bless family/person in need per quarter

### Friends

1. Develop 2 new friendships
2. Expand transparency/intimacy in 2 friendships

### Health

1. Lose 20lbs
2. Walk and workout 5 days/week

## Sample Legacy Plans

### SPOUSE

- Loved my wife tirelessly
- Understood her
- Lived to fulfill her dreams
- Full of grace
- The times we laughed
- Our moments

### KIDS

- I worshiped a Mighty God
- Loved their mom more than anything in the world
- Spending time with them was my greatest joy
- Loved others more than myself
- Word of God was life's priority

### PARENTS

- Honored them (Ex. 20:12)
- I loved spending time with them
- I desired their counsel
- I was grateful for their sacrifice and commitment

### FRIENDS & COLLEAGUES

- Integrity
  - Their success is important
  - I care personally for them
  - Above and beyond
  - Fun was a priority
  - You win with people
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# Concluding Thoughts

Intentionality. That's the key. For most of us, we're intentional with our professional lives and unintentional with other areas (like our family and spiritual lives) that we claim have a higher priority. We act as if our family and friendships and even our spirituality will just naturally happen, but the undeniable principle of entropy should scare all of us—things tend toward disorder, not order, if left alone. Given the law of entropy, a haphazard approach doesn't make sense at work and it doesn't make sense for this broader thing we call life. Friends, it's time for us to be purposeful in cultivating the health and flourishing of the people in our lives that we value most. We need to build a comprehensive life plan that will give us the best possible shot at yielding the abundant, faithful, and fruitful lives God has called us to live (John 10:10).

As I write this, my oldest son is in 9th grade and my oldest daughter will begin high school next year, meaning we're only a few short years away from sending them out to step into the calling God has on their lives. Bradford and I want to be intentional in equipping them not just to survive college, or the working world, with some measure of faith, but "to seek first the kingdom of God" (Mt. 6:33) in whatever God has for them.

We're learning from friends who inspire us and are a bit ahead of us. One friend, Terrence Chatmon, has been called by God to make the intentional development of the spiritual health of families his life calling. In his book on the subject entitled *Do Your Children Believe*, Terrence describes a scene with his family that is a dream of mine, and I'm guessing it is for most of you that are following Jesus.

Before I describe the scene, let me give you the backdrop. Terrence developed a comprehensive life plan for his family when his kids were close to high school, one that wouldn't end when his kids were out from under his roof. They made a commitment (he calls it a covenant) to add anyone their children were beginning to consider a "significant other" and to do so early on in the dating process, so they could "enjoy becoming acquainted not only with the person's face around the house, but also with his or her life and spiritual heartbeat." [2] Even though his kids are married now, they still gather every week for an hour either in person or on zoom "to spend a good hour or more in devotions, prayer and faith-building with one another... Not only do I get to share with my kids what I've been learning, but they often are the ones leading our sessions now, leading out in prayer and leading my wife and me through the things God is showing them. They are sharing... testimonies about some of the people they've been trying to lead to Christ, how they're ministering to one or more of their friends going through a hard time, stories about how God is opening doors for them to engage life-on-life with other, mentoring them, disciplining them. I can hardly drink it in. What God has done in our family -- such an everyday, run-of-the-mill family--is enough to melt me away in overwhelmed gratitude." [3] This is my dream for my family and for all of yours. I want all of us to be overwhelmed by gratitude with the joy of seeing kids, family members, colleagues, and those we love stepping courageously and joyfully into the purposes God planned for them before the foundation of the world (Eph. 2:10). Lord, make it so!

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[2] Chatmon, Terrence. *Do Your Children Believe*, Thomas Nelson, Nashville, TN, Pg. 150.

[3] Ibid pg. 132.