



# LIFE COACHING

CERTIFICATION  
PROGRAMME

*Action Planning Template*

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# CREATING YOUR ACTION PLAN:

## What is action planning?

Action planning is the process that guides the day-to-day activities that will enable you to fulfil your greatest life vision. Your action plan will determine:

- What needs to be done
- When it needs to be done
- By whom it needs to be done
- What resources and inputs are needed to do it

Action planning is the process of operationalising each and every one of your goals. The action plan you produce for any of your goals must consist of the following:

- A statement of what must be achieved (the long, medium or short-term goal).
- Details of the specific steps that have to be followed to fulfil the goal.
- A time schedule for when each step must be completed by and how long it will take.
- Details of who will be responsible for ensuring each step is successfully fulfilled.
- Clarification of all the inputs and resources that are needed to fulfil the goal.

## Exercise: Creating Your Action Plan

**Choose a number of small or medium term goals (perhaps goals that you've defined in the goal setting workbook) and build them into the following worksheets. Then get creative about how you fill in all the missing blanks.**

**Tip:** Make each action step as simple and specific as possible, breaking down complex actions into single steps.

# Goal: Social & Family Relationships

<b>Action Step</b> What needs to be done?	<b>Responsible Person</b> Who should take action to complete this step?	<b>Deadline</b> When should this step be completed?	<b>Necessary Resources</b> What do you need to complete this step?	<b>Potential Challenges</b> Are there any potential challenges that may impede completion? How will you overcome them?	<b>Result</b> Was this step successfully completed? Were any new steps identified in the process?

# Goal: Career & Educational Aspirations

<b>Action Step</b> What needs to be done?	<b>Responsible Person</b> Who should take action to complete this step?	<b>Deadline</b> When should this step be completed?	<b>Necessary Resources</b> What do you need to complete this step?	<b>Potential Challenges</b> Are there any potential challenges that may impede completion? How will you overcome them?	<b>Result</b> Was this step successfully completed? Were any new steps identified in the process?

# Goal: Money & Personal Finances

<b>Action Step</b> What needs to be done?	<b>Responsible Person</b> Who should take action to complete this step?	<b>Deadline</b> When should this step be completed?	<b>Necessary Resources</b> What do you need to complete this step?	<b>Potential Challenges</b> Are there any potential challenges that may impede completion? How will you overcome them?	<b>Result</b> Was this step successfully completed? Were any new steps identified in the process?

# Goal: Physical Health, Recreation & Leisure

<b>Action Step</b> What needs to be done?	<b>Responsible Person</b> Who should take action to complete this step?	<b>Deadline</b> When should this step be completed?	<b>Necessary Resources</b> What do you need to complete this step?	<b>Potential Challenges</b> Are there any potential challenges that may impede completion? How will you overcome them?	<b>Result</b> Was this step successfully completed? Were any new steps identified in the process?

# Goal: Life's Routine Responsibilities

<b>Action Step</b> What needs to be done?	<b>Responsible Person</b> Who should take action to complete this step?	<b>Deadline</b> When should this step be completed?	<b>Necessary Resources</b> What do you need to complete this step?	<b>Potential Challenges</b> Are there any potential challenges that may impede completion? How will you overcome them?	<b>Result</b> Was this step successfully completed? Were any new steps identified in the process?

# Goal: Contribution & Giving Back

<b>Action Step</b> What needs to be done?	<b>Responsible Person</b> Who should take action to complete this step?	<b>Deadline</b> When should this step be completed?	<b>Necessary Resources</b> What do you need to complete this step?	<b>Potential Challenges</b> Are there any potential challenges that may impede completion? How will you overcome them?	<b>Result</b> Was this step successfully completed? Were any new steps identified in the process?



# Goal: My Character & Inner Wellbeing

<b>Action Step</b> What needs to be done?	<b>Responsible Person</b> Who should take action to complete this step?	<b>Deadline</b> When should this step be completed?	<b>Necessary Resources</b> What do you need to complete this step?	<b>Potential Challenges</b> Are there any potential challenges that may impede completion? How will you overcome them?	<b>Result</b> Was this step successfully completed? Were any new steps identified in the process?