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THE SOURCE

BE YOU IN THE WORKPLACE

Clarity & Planning Mini Workbook

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Introduction

Winston Churchill once said,

"The further back you look, the further ahead you see."

I agree and that's why I like to look back on my activities regularly. I look back daily, monthly, quarterly, and yearly. I want to document as much data as I can and pull out the wisdom. By looking at all areas of my life, it gives me a truer, more accurate, whole picture of what's gone on.

It reminds me that we remember 10% of what we hear, 20% of what we read and 50% of what we do. That last point is crucial. As our memories are prone to inaccuracies, the closer to the event you record, the more chance you have of remembering it correctly.

Reflection is key for setting meaningful goals, for if you want to find out how to get from where you are now to where you want to be, you have to understand yourself better, and that means deciphering the lessons you've learned and knowing what you're capable of.

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Too many people don't take time to review their performance and plan ahead. And too many people only focus on one aspect – typically their career. Perhaps that's why most are unfulfilled and not living the life they want.

Whilst success is a personal affair, everyone agrees that it doesn't happen by accident. It's something that has to be crafted and worked on day-in, day-out. It requires laser focus, discipline, consistency and often courage. Additionally, it needs you to have strong self-belief, to level-up, form habits, and to ask for help. You have to honour the process, too, as it takes time.

This little mini workbook, which follows on from the masterclass contains some crucial exercises to help you. To get a deeper drive, then you'll need to take my Clarity & Planning workshop and use The Source's Planner which is coming soon.

So, with all of this in mind, let's look back at your period or phase in your life. Get ready to dream big, so you can make your ambitions a reality.



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How to Use this Mini Workbook

Print out this mini workbook, grab a drink and unless you're in one of my workshops and we're doing this together, take yourself off somewhere quiet and peaceful. Put some relaxing music on – anything that helps to get you in the zone. You want to create an inspiring space for yourself, so you can reflect on what's gone on and dream big for what's ahead.

If a question isn't relevant to you, just leave it out. Work through what you can, come back to questions after giving yourself time to think – in a few hours, overnight or in days. Leave out anything that doesn't work for you.

Above all, have fun with this!

A large, stylized handwritten signature in black ink that reads "Jane". The letter "J" is particularly large and loops around, while "ane" is written in a cursive, flowing style.

P.S. If you have a team, you want to include them, too.

Let's
do this!



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Overall Assessment

The goal of this assessment isn't to test you. There's no right or wrong answer. Rather, its purpose is to give you an overall impression of how you rate yourself in each of the eleven major areas of life (the categories), and to help you identify where you can improve. It's to help you become more aware – to help you see the progress you've made, the failures, and lessons you've learned. It's to celebrate your courage and ambitions, too.

Therefore, don't stress about the exact wording of the descriptions. As I said before, just enjoy the process and use this as an opportunity for reflection. It will serve you well. Also, don't compare yourself to another person including yourself. You are not the same person you were yesterday let alone a year ago. Don't change your notes if you share your discoveries, either. Comparison *is* the thief of joy. These are your words, feelings, learning lessons and intentions. They are no better or worse than any other person.

Instructions

Choose a period, for example your last year, last quarter, or last month. Read these statements and circle or highlight the one where you believe you are. The categories scores are as follows: 1=Not very good and 10=acing it!

1. My Body

1 2 3 4 5 6 7 8 9 10

I take regular exercise so that I can look and feel my best. I demand high energy and for my body to be strong and optimised for whatever I ask of it. I feel well and have good stamina, so I'm well equipped to enjoy the roller coaster ride of life.

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2. My Nutrition

1 2 3 4 5 6 7 8 9 10

I nourish my body with nutritional food, vitamins and supplements every single day. I make sure I eat only the highest quality foods that are within my budget. I keep myself hydrated with water (2/3 litres per day), alcohol to a minimum and get at least seven- hours of sleep each night. I view my body as my temple. It's a vehicle to my well- being.

3. My Mind

1 2 3 4 5 6 7 8 9 10

I am committed to self-care and choose positive, joyful outlooks each day. Meditation forms part of my daily routine and I am cultivating a sense of serenity in my life. I understand how powerful the mind is and take care of my mental well-being. I am mindful of my energy, focus, and emotions.

4. My Loved Ones

1 2 3 4 5 6 7 8 9 10

I trust, value and feel deeply connected to my loved ones. I'm present in the moment with them, do the best for them, and ensure that work doesn't get in the way of my time with them. I create fun and positive energy around them. I'm patient, respectful and show compassion and love for them. I understand that we are all on a journey of personal development together.

5. My Friendships

1 2 3 4 5 6 7 8 9 10

I have good friends and value them. My friendships bring fun, laughter and renewed energy into my life and I reciprocate by bringing the same into theirs. I surround myself with positive, caring and giving people who share my core values, and avoid takers and victims, who attract drama.

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6. My Career

1 2 3 4 5 6 7 8 9 10

I know what I want out of my job (or business). I have a clear vision and mission. My work energises me, plays to my strengths and I feel valued. I know why I do what I do and can communicate this so everyone understands.

7. My Free time

1 2 3 4 5 6 7 8 9 10

I incorporate and schedule enough leisure activities and experiences—holidays, adventures, nights out, parties, sports, hobbies, me-time—into my life so I feel fulfilled and balanced.

8. My Spirit

1 2 3 4 5 6 7 8 9 10

I make time for my spirituality and am deepening my connection to it. I understand how important it is, and that spiritual people have positive relationships, high self-esteem, are optimistic, and tend to live a purposeful life. My spirituality is aligned to my beliefs and values. I use it and my intuition to guide my decisions and daily actions.

9. My Environment

1 2 3 4 5 6 7 8 9 10

My environment, whether at home or at work, offers the right mix of support and challenge so it stretches and develops me. I always ensure my environment includes people who lift me higher, have my best interests at heart and challenge me to perform to the best of my ability.

10. My Personal Development

1 2 3 4 5 6 7 8 9 10

I'm hungry for learning, have a beginner's mind, ask questions and am open to learning more. I adopt an inquisitive, curious mindset and pay

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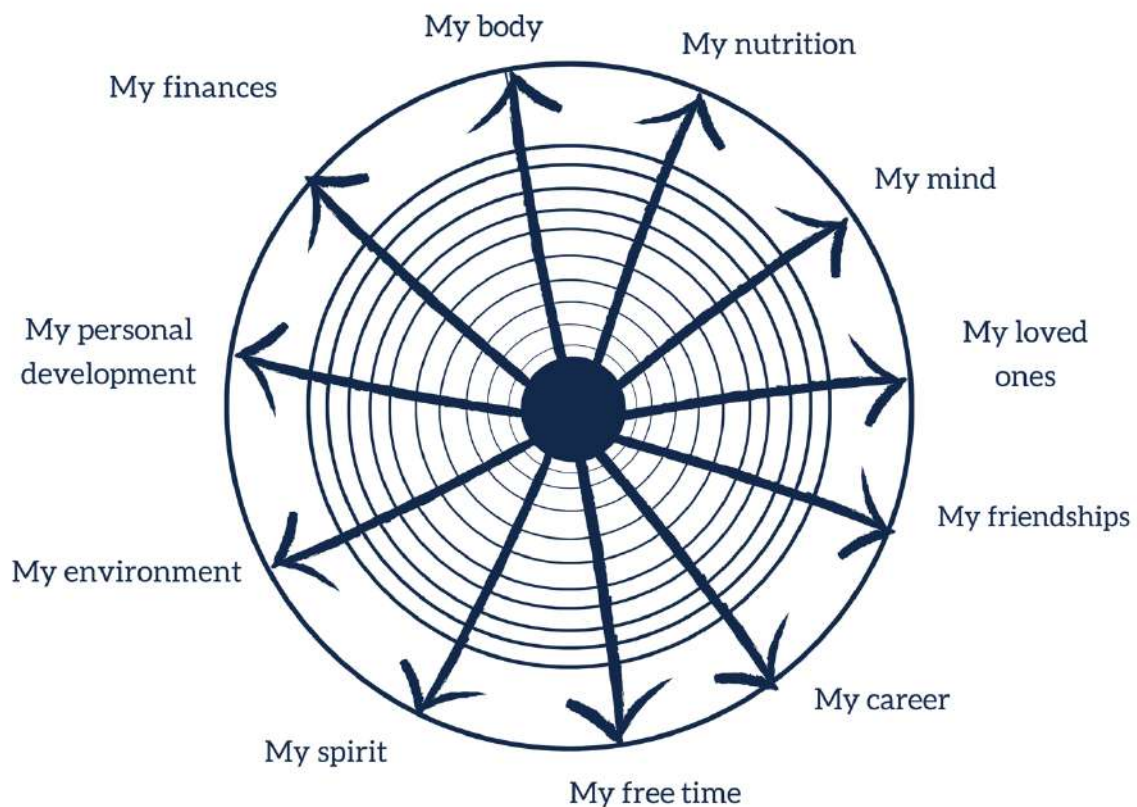
attention to the world around me. I want to know myself and others better. Continuous improvement is high on my agenda. I understand your level of success will rarely exceed your level of personal development because success is something you attract by the person you become. I therefore seek to further my own personal and professional development.

11. My Finances

1 2 3 4 5 6 7 8 9 10

I budget and am being responsible for how I spend my money. I save for my future, invest and make regular donations to charities. I am happy with my lifestyle, and what I'm earning, and regularly treat and reward myself.

Now that you've gone through these, plot these on the wellness wheel.



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Considering your categories, on a scale of 1-10, with 10 being the highest, and looking at your wheel, how well do you think your last period went, overall? Think about how happy you were as well as your successes.

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

On a scale of 1-10, how hard did you have to work?

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

What ONE word describes this period?

What emotions does this period bring up for you?

Success + Achievements

To progress, evolve, and attain your goals you must pay attention to what worked, and to do that you have to take stock of your wins and achievements. So, consider these questions and jot your answers down in the boxes.

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What wins or achievements were you most proud of?

Take a moment to congratulate yourself. Acknowledge how well you've done. Really own your wins. All too often we don't. We just rush on to do the next to do and task. Please don't do this. Find 5-minutes and think about what it feels like to win. Think about where you feel it in your body. Pay attention to any emotions that come up and reflect upon them. This is important because it will help you understand yourself better and clear negative thought patterns. It will also anchor your wins in your body and allows you to recommit to yourself as the woman who can have them.

Now, answer these questions.

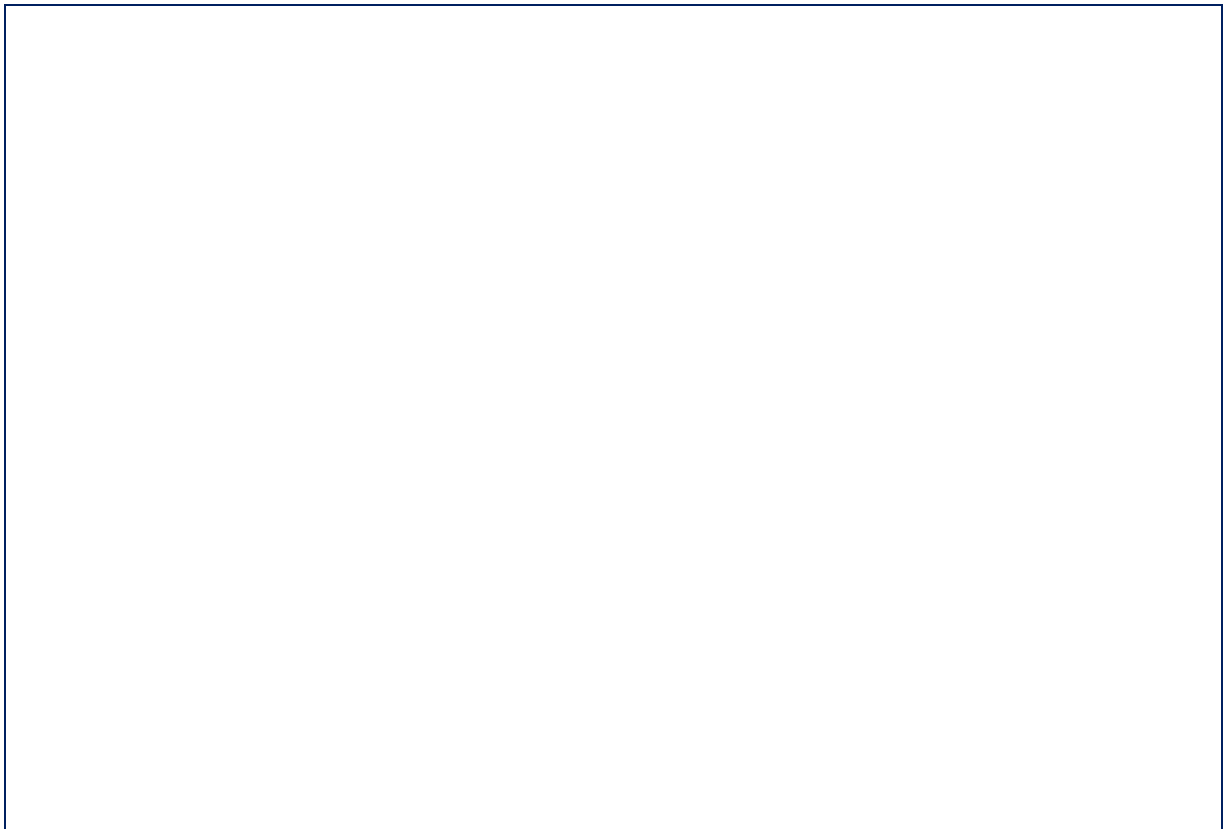
What activity or successes filled you with energy?

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What qualities, traits or skills helped you make progress?



What did you have to do to achieve these?



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What did you have to give up or sacrifice to achieve these?

Life is a game of trade but you're the designer. You have that freedom to choose and act. So, tell me; how do you feel about this trade?

Are you content with it or do you want to change it?

We're not going to look at solutions yet.

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Complaints + Niggles

Let's flush out all the things that are annoying or frustrating you. All the things that you'd sooner not have to deal with but are most likely putting up with and tolerating. These things are taking up your energy and are silently bothering you.

What is frustrating you? Write down everything that comes to mind.

A large, empty rectangular box with a thin black border, intended for the user to write down their frustrations.

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Your frustrations show you where you are committed so understand this:

Frustration = Commitment.


Now let's look at some conversations you're not having. What are you withholding? What is getting you worked up. Let's uncover these and again, free you up.

What conversations are you not having? Think of 10 and write them down.

What	With whom?

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How are you feeling because you're storing these up? Write down all your emotions. Release them now until you can write no longer.



So, there are some brave conversations you ideally need to have, but before having them, let's look at why you're not having them?

What are you worried might happen if you tackle this as a conversation? The mind is powerful and it's so easy to accumulate or even borrow untruths. Write down all our reasons. Then, consider all your concerns and whether they are really likely to happen or not. Cross them out if you think they are unreal. It's incredibly liberating.

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Why are you not having these conversations?	Real or unreal risk?
What is the perceived risk?	

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Clarity

*"The more of me I be,
the clearer I see"*

Remember this quote is by writer, artist, and intuitive medium Rachel Archelaus and from now on, I want you to understand this too...

Clarity = less wasted time.

Clarity = getting what you want.

Clarity = feeling good.

Clarity = power.

To achieve anything in life, you must first make a clear decision and commit to a specific outcome. So, consider what you want.

Be crystal clear and specific. Add in timelines, venues, people and so on. The more details you have the better. If it relates to your career, here are a couple of examples,

"I want a salary rise of \$10,000 and to be promoted to manager by the end of this year."

"I want to be employed by a top 10 consultancy, as a consultant with a \$10,000 signing on bonus, in the next 3-months."

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What things do you want? Write as many as you want. Let your desires and dreams flow.

A large, empty rectangular box with a thin black border, intended for the user to write their desires and dreams.

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How do you want to feel?

Now pick ONE thing. What ONE thing do you want?

I want you to consider why you want this. This question is important because if you want to stretch yourself, realise your dreams, and achieve the big hairy audacious goals you've set yourself, then you're going to need to understand exactly why they matter. You must see yourself getting them and believe in yourself 10,000%.

I learnt many years ago that purpose fuels passion, so write a few sentences on the next page.

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Why do you want this? Why is it important? Why are you obsessed with this? Why does it matter?

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Excuses

The biggest thing standing between you and what you want is not your gender, your manager, or some other external force — it's you. Specifically, your excuses. Now is the time for you to rid yourself of them.

Here are the most common excuses I hear.

I can't afford it. I can't because I don't have enough time. I can't go because I live too far away, and I can't find childcare. I can't apply for that job because I'm not qualified enough. I can't speak at that event because I don't feel ready.

In my world, can't equals won't and excuses are saved for amateurs. High achievers know there's always a way to get what you want if you become resourceful.

So, let's discover all the excuses that are standing in your way and how often you're using them so you can rid yourself of them. Write down all the things that might stand in your way to get the outcome you desire.

What stories are you telling yourself about why you can't get or have what you want? Don't stop until you have 10. Then, go back to them and consider whether they are bulls**t. Cross them out if they are.

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Excuses	True/ untrue?

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Asks

Every frustration, niggle or complaint hides a desire, and unmet emotional needs can be on account of a lack of clarity. By now, you should be feeling much clearer about what you want. The final thing I want you to do is to discover what asks you need to make. Women are taught not to ask from an early age. They're taught about the penalties that can come from an ask, i.e., the unspoken debt or the quid pro quo. However, realising your goals, dreams and desires always requires assistance, support, partnerships, and collaboration. You can't do what you want to alone. You must get good at asking, and in a clear and concise manner.

Asking makes all your unspoken requests and non-verbal communication signals visible. By putting them into language it makes you get clear, and it gets things flowing when things are blocked.

What asks do you need to make?

What do you need to ask?

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Now let's put it all together.

What do you want?

--

What might stand in your way? Real or unreal? How can you get it?

What might stand in your way? Real or unreal? How can you get it?		

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Commitment

There's a great quote by William Hutchinson Murray (often misattributed to Goethe) which I remind myself often, especially when I'm going for a big goal and it's this,

*"The moment one
definitely commits
oneself, then
Providence moves too"*

The fuller piece is worth reading as there's so much wisdom in it.

"Until one is committed, there is hesitancy, the chance to draw back. Concerning all acts of initiative (and creation), there is one elementary truth, the ignorance of which kills countless ideas and splendid plans: that the moment one definitely commits oneself, then Providence moves too. All sorts of things occur to help one that would never otherwise have occurred. A whole stream of events issues from the decision, raising in one's favour all manner of unforeseen incidents and meetings and material assistance, which no man could have dreamed would have

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come his way. Whatever you can do, or dream you can do, begin it. Boldness has genius, power, and magic in it. Begin it now."

So, it's time to fully commit and I'm going to let you know exactly how you can do this, so you double, if not triple your chances of attaining what you want. It means planning out your behaviours rather than relying on willpower and motivation to inspire you to act. Those ways actually decrease your chances of attainment.

Heidi Grant Halvorson, a professor from Columbia University puts it like this. *"Deciding in advance when and where you will take specific actions to reach your goal can double or triple your chances for success."*

According to research there are numerous ways you can double your chances for success. In a study published in the *British Journal of Health Psychology*, researchers measured how frequently 248 adults exercised over a 2-week period.

They started by randomly assigning one of the adults to one of three groups. The first was a control group and participants had to read a few paragraphs from an unrelated novel. The second focused on motivation and participants were asked to read a pamphlet that described the benefits exercise could yield in terms of heart disease. Participants in the third group were focused on intention. They had to read the same pamphlet as the second group, but they were asked to devise a plan for when and where they'd exercise over the following week. They were asked to specifically state what they would do, at what time, and at what place. Here's the exact sentence they were asked to complete....

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During the next week, I will partake in at least 20 minutes of vigorous exercise on [DAY] at [TIME OF DAY] at (or in) [PLACE].

The researchers discovered what converts desire into action and increases the chance of follow through isn't the level of motivation, but rather it's the plan for implementation. In the intention group, 91% of participants exercised at least once per week compared to 35% in the motivation group and 38% in the control group.

These findings aren't unusual. In over a hundred separate studies that encompass diverse experimental situations, researchers agree: people who explicitly state when and where their new behaviours are going to happen are much more likely to stick to their goals. Their environment (the time and place) becomes a trigger or cue for action. It works as a tool to trigger behaviour, as the goal now has a time and space to live in the real world.

So, now it's your turn. Complete the sentence with the action you are going to take.

*During the next week, I will partake in [insert the action you will take]_____ on _____
[insert day] at _____[insert time of day] at (or in)
_____ [insert place].*

Now you have a formula for getting clear and acting upon it, you can repeat this as often as you want and for more of your desires. By doing so, you increase your likelihood of attaining your goals and aspirations.

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Final Note

As I wrap things up, remember, you can't control how everything will go. Life will always get in the way of your plans, and it will usually throw a curveball every six months. There's even a well-known saying,

*"Man plans,
God laughs"*

Successful people know these things. Additionally, that nothing will get in their way. They rise to the challenge, set boundaries and understand that some opportunities aren't really opportunities at all. Instead, they're there to distract them. Importantly, though, they use their ambition, experience and internal drive to keep them focused.

Your dreams are yours for the taking, but only when you're specific about them plus plan and implement them. So, be ambitious, get clear on what you want. See it as a done deal. Feel it in your body and go make your dreams your reality.

You've
got this!

