

My Balance Plan

Why do a balance plan?

We all get times in our lives when competing priorities mean we spend more of our time doing things that don't really make us happy. Writing a balance plan is a good way of reviewing where you are, and whether some changes might be needed.

Hopefully along the way you will also be inspired to use all the amazing skills, knowledge and experience you have already accumulated, to do things you are not currently doing, that help you explore your potential.

Who is a balance plan suitable for?

It makes no difference whether you work full time, part time or if your work is at home and un-paid.

The objective is to get you to think more broadly about what you do with your time and how you can get a better balance for you.

Of course it goes without saying, you don't need to be a mother to find the process useful.

How long will it take?

Completing your balance plan might take 20 minutes or 20 hours, it really doesn't matter how long it takes, but the more thought you put in, the more benefit you are likely to get out of it. Most people reckon on 2-3 hours over a couple of days, followed by a few discussions with friends or family.

What does the process involve?

There are three steps, complete your balance sheet, complete your dream sheet, and then your balance plan, which identifies some small things you want to change. Some people may also want to follow this with a life plan, which sets broader life goals.

The first step is to complete your **Balance sheet**, which should reflect where you are now. It is usually the most time-consuming part of the process, as it asks you to look at all different aspects of yourself and your life. After completing it, you should have a clearer picture about who you are and what makes you happy.

Following this you complete your **Dream sheet**, which is an attempt at describing what the 'perfect' you looks like. Finally you identify some small changes you want to make, and set yourself some objectives, completing the **My Balance** sheet. You can, also if complete the life plan template as well, if you want to make some bolder changes. (See back end of document for all templates).

What Resources do I need?

To complete your balance plan you need some interruption free time, and a note book that you can add to over then next few days, as you start to reflect.

Ideally it would also be good to 'recruit' a friend to discuss your draft plan with, to help get another perspective, and also some support

with any changes you want to make at the end of the process. You will also need to be able to use the internet for at least one of the exercises.

Getting Started - My Notebook:

Open the first page of a new notebook, and start to scribble

It might help to think up some words that describe how you are feeling, and why you want to do a balance plan – this will help you get clear on your starting point. Jot these down in your note book. You could write down a starting objective: **I am reviewing my Mum-Life-Balance because**

If you would like to try and measure your change, you could rate your current balance on a scale of 1 – 10 (1 being not happy and 10 being as happy as I can be).

Once you are clear on the ‘whys’, move to the ‘whats’, and start completing your balance sheet.

My Balance Sheet:

Starting with any box that appeals, work you way through and write the summary of your thoughts in that box. There are exercises to help your thinking if you need them.

The things I love and hate doing..	The main roles I play in my life	The quality of my important relationships ..
What I value in life..	Things I'm good at - My Skills	What I know a lot about - My Knowledge
What I am experienced in...	Things that energise and motivate me..	How I spend my time ..

Box 1 - Things I love and hate doing: ...

This box is about the things you love, the things that energize you, and make you feel good when you do them. The things you love most will be the things that make you feel great inside, and give you a really emotional kick – you might want to think about different stages in your life, and what made you really happy and energized in each of them.

The things you hate, will be the things that drain you, bore you, make you frustrated, emotional or just plain cross. We all have to do things we hate, but when the list of things we hate outweighs the list of things we love, its probably time to make some changes....

If you want some help completing this, you could have a go at SMILE TRACKER.

SMILE TRACKER:

Think back over the last week, month and year and write down the main things that made you smile, laugh, or feel really good about yourself. What were you doing? How did you make this happen? If you can't think of anything immediately don't panic, just keep going back to a time when you felt happy, and write down what was important about it. Try thinking about things or people that motivate you, or energise you and why this is. Jot the answers in your note book.

Box 2 -The main roles I play in my life

Everyone of us has a whole raft of different roles, whether they are roles at work, such as coach, manager, team player, person who does the stuff everyone else leaves; or roles at home such as mother, partner, daughter, sister, niece, friend, cleaner & household manager, dogs body, gardener, neighbour, carer or DIY jobber.

What makes “you” is often a combination of the roles you are playing at that time, the situation you are in, and your personality and habitual behaviours you have developed over the years. There are times when the roles you are forced to play might bring out stuff in you that you don't like, and makes you feel cross with yourself or others.

Listing all the roles you play is the first step in acknowledging how they interact, and which roles cause friction when combined. For example its not be normal for a mum to play home manager, partner and mother all at the same time without occasionally losing the plot (or in my case regularly!).

Think about the roles you play, how they interact, which ones you put most energy into – do these align with things that make you smile and feel good about yourself?

If you think there might be an imbalance in the way you spend time in different roles, have a look at ROLE SPAGHETTI.

ROLE SPAGHETTI

In role spaghetti, the objective is to identify the main roles you play, and think about how much time you spend in each role, vs how important it is to you.

Firstly map out the main roles you play, and, if you had to divide up a normal week, put a circle round each role that represents how much time you spend in that role.



Then, think about the last week or month, and identify points/ events where roles clashed. Eg Mum, Partner, Houseworker, friend, worker. Draw a spaghetti like line coming out of that role, and then wiggle it around till it touches all the roles that clashed with it:

Repeat until you have thought about two or three clashes, and you have a tangle of spaghetti:

- * **Which roles clash the most?**
- * **Are there any roles that you just didn't play?**
- * **Are you spending more time in one role at the expense of quality in other roles?**
- * **What compromises were made to reach a resolution – were they good ones?**

Example: *last week my mum came over for the first time in ages – I was trying to be the perfect daughter, so as I tried to get the kids to do their homework, I was cleaning the kitchen whilst baking a cake.... Then a work e-mail came in and put me off.... The cake got burnt and I shouted at everyone!.. So mother, cook, cleaner daughter and worker got all mixed up until the cake got burnt...., and everyone suffered (save my mum who got a shop bought cake!)*

Then think about where the role clashes tend to happen in your life. What could you do to balance the different roles more effectively so you spend more time in the roles you enjoy, and less time in the ones that are less fun?

Box 3 - The quality of my most important relationships:

Having a look at the most important relationships in your life (at work and at home), and thinking about what the quality of the relationship is important, as its hard to live harmoniously with people if the assumptions we hold about them are inaccurate. Do you really know where your boss/ child/ friend/ co-worker was coming from last week when they looked frustrated? Do you know about what's on their mind? - Do they know what is on yours?

How could these people make a small change that would have a huge impact on your life – what would it take to get this change to happen? – What can you do to improve the quality of your relationship with them?

If you want to spend less time in roles/ tasks you dislike, you may have to work on the relationships that might be affected, and think about how you get to a win:win.

If you want to spend more time on your important relationships, you could try mapping all the people in your life, and thinking about how they can influence it for better or worse. Which relationships do you find easy and positive? Which relationships are more difficult? Where could you best invest some time and energy to make your life better/ get results that are important to you?

Box 4 - What I value in life:

Thinking about what you value, ie what's most important to you lies at the heart of having a great balance. If you feel that what you are doing with your time and energy is aligned with what you value, you will be much more likely to feel a good balance, and hopefully be happier.

You could simply pick out the most important values from the values list, or you could have a go at Made in X. There are loads of sites on the internet that outline lists of personal values – I like http://www.brefigroup.co.uk/resources/values_list.html, but you might want to search around to find another one that suits you better.

Identify your top 5 or so values, and then think about how these are met in your current life – are there areas where what you are doing is crossing or not supporting what you value?

If you think there might be some issues around your values, you might want to have a go at MADE IN X (Essex in my case!).

MADE IN X... This exercise is about thinking about the key events in your life that made you who you are today. Its quite simple, starting from your earliest memory, jot down a list of the key things that happened to you in each decade up until now. Once you have a reasonable list, try writing what you learnt from each event, and

what skills/knowledge or experience it gave you. Once you've done this, think about what the events tell you about what you value in life.

Box 5 - Things I'm good at... - My Skills

Try to list what you think you are good at, it could be anything from making people laugh to something you were good at in a job or even at school. Think about things you are skilled at. It doesn't necessarily mean you have to be extraordinarily good, compared to other people, more things that you find easy/ come naturally to you. Try to list 5-10 things. When you have done this try to think about ways you could use your strengths/skills to try something new, or to help you solve a problem you are currently facing. Can you use your strengths in a way that supports your values?

If you get stuck you could: (Actually even if you are not stuck this is a great thing to do – I did this a while back and learnt some useful stuff about how others see me).

Phone a Friend – ask you friend to have a think about what they think you are good at, and what they value in you. Ask them to tell you which skill you have that they think you could use more often, or in different ways. Ask them what they think you might be good at, that they have never seen you do before.

Ask the same sort of questions to some people in your life who know you really well.

Have a look at Made in X – if you did not do the Made in X exercise previously this might also help you think about what your most important skills are.

Box 6: What I know a lot about – My Knowledge

Over the years everyone accumulates knowledge, and your knowledge will be different, and unique to you. Your knowledge is a gift that can be shared in work/play/friendships and almost any social situation to create value. Have a think about your main interests, your studies, jobs, and anything you would write on your CV/Resume. Write down a list of the subjects you know a lot about...

Then think about how you use your knowledge. Do you use the things you have most knowledge about, or are there things you are pretty expert at that just don't get used?

Again, the Made in X exercise might help you identify what you know.

Box 7 - What I'm experienced in

Your experience is really important for your future. Experience reduces the risk to result ratio when you try something out. Practice reduces it even further. Thinking about your experience, both positive and negative can be a great way of ensuring

that you repeat good experience and minimize bad experiences in the future. If at the end of this process, you identify some changes you want to make, practice will also be key!

Listing your key life experiences, and what they equip you to do going forwards is a great way of helping identify future goals. You might be happy to continue doing what you currently do, in which case its really important to think about how you can keep repeating positive experiences. You might want to do something a little bit or even very different, and again understanding your past experiences can help you think about what sort of things you are likely to enjoy in the future.

Write down a list of the 5-10 things you have spent a lot of time doing in your life, and that are important to you. These will be things you have experience in. Even if you don't particularly enjoy all the things you are experienced in, it doesn't matter, as this is your starting point for thinking how your experience could be deployed in a different, more enjoyable way. Another idea to help you is to look at your most recent CV or resueme, and think about what it would say if you had reached your career goal and were doing the perfect job.

Box 8 - Things that motivate me:

Write down 5 or 6 things that motivate you to do things. What really makes you feel alive, energized and enthusiastic?

If you did the SMILE TRACKER exercise, which things were important motivators?

Understanding what motivates you, and doing things that motivate you is a really key enabler to a happy balance. This is something you might have to think about quite hard, the clue is usually in past situations where you felt energized and determined. This might be another section to discuss with someone who knows you well, ask them to ask you about something you felt motivated to do, and then ask them to ask you at least 5 'whys' ... with any luck drilling down 5 times will get you to the 'root' of what is making you do something.

Box 9: How I spend my time.

Draw an apple pie, (or chocolate cake if you prefer), and then have a go at dividing up how you spend your time in a typical week. You could for example use headings like: House chores/ admin, Work, Sleep, Kids chores/ routing, playing with kids, relax time, time with my partner, family time, me time.

You could then have a go at completing one for weekends on a typical year, including headings like, holiday, family, friends, house jobs, sport, kids activities etc.

Having had a look at how time is spent, what do you notice about the things you spend your time doing? What would you like to do more or less of?

Summary:

So now you have a load of information about where you are now, hopefully scribbled down in your boxes and in your notebook.

The picture you see should describe your likes and loves, your roles and relationships, your values and motivators, your skills knowledge and experience and how you currently apportion your time.

If you were summarizing what you have found out to a friend, what would you say to them? What strikes you as most important?

So now you've done the hard bit – it gets easier

Stage 3: Completing your Dream Sheet

Your dream sheet should be about 'perfect you' To fill it in, think about your friends and family, and try to complete the sheet from their perspective.

You think I am the happiest person you know because:

You see me doing	You see me as	You see me with
If I died tomorrow you know I spent my time on this earth wisely because....	Friends and family want to be with me because	I use my skills, knowledge and experience to:
I am authentic - my behaviour is aligned with what I value, and you see this from the way I ..	I am proud to be me because ..	I spend most time on ... and least time on

In this sheet, use the thinking you have done in completing your balance sheet to jot down the important things in each box.

When you have finished, ask yourself if this describes the person you want to be? Is this realistic? What changes could you make to be this person more of the time?

If you were talking to someone close to you about your dream sheet, what would you say? If there were no limits, what would you change in your life?

You might even actually talk to that friend, asking them for an hour of their time so you can talk about the process you have just gone through, and want to bounce some possible actions off them.

Just talking about your balance plan may be enough to clarify a few Small Things that you want to change.

Try writing them down, and then imagine they were 'work type' objectives – where would you write them down, and how would you review them?

Are they SMART (Specific, Measurable, Attainable, Relevant and Timebound).

Stage 3 My Balance Plan



Just writing your small things down, might be enough to help you enable some small changes in your life. Have a think about how you can make yourself more likely to make these changes?

- 1) share your objectives with people around you and ask for their support and feedback
- 2) arrange a coffee with a friend (who you have shared your balance plan with) for 3 months time, and tell them what you will have achieved by then.
- 3) think about other people who can help you make changes/ achieve something new, there will be people in your network who have the right knowledge – who can you ask? Write down a list.
- 4) Put things in your diary, Facebook page or try 43 things – a great site that helps you set goals and get some support.

Stage 4 – My Development Plan

You might want to stop after you've identified a few small changes you want to make in your balance plan. If you are looking to make some bigger changes, you might want to continue the process and put together a development plan.