

SUCCESSFUL

GENERATIONS[®] COACHING

Coaching for the next generation of family business leaders

LIVING AN AUTHENTIC LIFE

with purpose

WORKBOOK

Confidential

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Successful Generations Coaching

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This workbook is designed to track your journey to living an authentic life with purpose. Come back to it regularly to review and revise. Most of these exercises are stand-alone, you do not need to do them in order.

RULES FOR ENGAGEMENT:

No judgement (or self or others) as you work through these exercises.

This is YOUR workbook, you don't have to share it if you don't want to.

Go with your gut when doing this work.

Nothing here is set in stone, it can all be changed.

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WHY do you want to lead an authentic life with purpose?

ASPIRATIONAL VALUES EXERCISE:

- Step 1:** Quickly Circle all of the values that resonate with you.
- Step 2:** Narrow your list to your Top 10 values (go with your gut here)
- Step 3:** Highlight those values you aspire to (your not quite living these yet)
- Step 4:** Further narrow down your list to your top 5 values, if you can. How do these values already show up in your life? How do you want them to show up even more? Focus on living by these values.

Abundance Acceptance Accountability Achievement Advancement Adventure
Advocacy Ambition Appreciation Attractiveness Autonomy Balance Being the Best
Benevolence Boldness Brilliance Calmness Caring Challenge Charity
Cheerfulness Cleverness Community Commitment Compassion Cooperation
Collaboration Consistency Contribution Creativity Credibility Curiosity Daring
Decisiveness Dedication Dependability Diversity Education Empathy
Encouragement Enthusiasm Entrepreneurship Ethics Excellence Expressiveness
Fairness Family Friendships Flexibility Freedom Fun Generosity Grace Growth
Flexibility Happiness Health Honesty Humility Humor Inclusiveness Independence
Individuality Innovation Inspiration Intelligence Intuition Joy Kindness Knowledge
Leadership Learning Legacy Love Loyalty Making a Difference Mindfulness
Motivation Optimism Open-Mindedness Originality Passion Performance
Personal Development Proactive Professionalism Quality Recognition Risk Taking
Safety Security Service Spirituality Stability Peace Perfection Playfulness
Popularity Power Preparedness Proactivity Professionalism Punctuality
Recognition Relationships Reliability Resilience Resourcefulness Responsibility
Responsiveness Security Self-Control Selflessness Simplicity Stability Success
Teamwork Thankfulness Thoughtfulness Traditionalism Trustworthiness
Understanding Uniqueness Usefulness Versatility Vision Warmth Wealth
Well-Being Wisdom Zeal

Add Your Own: _____

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What are your top values and why?

- 1.
- 2.
- 3.
- 4.
- 5.

How do you embody these values with your actions?

- 1.
- 2.
- 3.
- 4.
- 5.

What are your family's values—the values you grew up with? See displayed in a family enterprise? (list as many as you can)

Without judgment, is there a conflict or discrepancy between your values and your family's values? If so, list here.

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ASPIRATIONAL PRIORITIES EXERCISE:

Step 1: a) How do you spend your time now? List everything that fills your time (school, work, family, friends). b) How do you WANT to spend your time?

Step 2: Narrow list to 5 Buckets

Step 3: Prioritize these buckets. Ex. 1) Me 2) My husband 3) My son 4) Successful Generations 5) Frey Foundation (philanthropy)

Step 4: Schedule these priorities FIRST in this order. For example, in my weekly calendar, I have scheduled My Activities FIRST before anything else. So, my personal trainer, physical therapist, walks, meditation—everything that allows me to put my oxygen mask on first and show up powerfully, goes into my calendar first. I would then schedule time with my Husband, and so on. I would schedule work time after time with my son.

Step 5: Schedule time for your non-priorities. (or say “no”)

Step 6: Honor your schedule. Repeat.

Result: Living by your priorities

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What are your top 5 priorities in order?

- 1.
- 2.
- 3.
- 4.
- 5.

SKILLS INVENTORY/ACCOMPLISHMENT LOG

List all of your skills and accomplishments in your workbook. Circle the skills and accomplishments of which you are most proud.

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PASSIONS:

What are you passionate about?

Overall, do you like/love what you are doing now? (go with your gut)

Yes No

If yes, what specifically do you like/love doing?

If no, what don't you like/love doing?

If you could, what would like to do MORE?

What would you like to do less or not at all?

What subject and activities ignite your curiosity?

HOW DO YOU REFUEL?

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PRESENT, FUTURE, OBSTACLES



PRESENT: WHO ARE YOU NOW? (describe your life right now)

If you were already living an authentic life with purpose, what would it look like?

What do others say about you? (the good and bad, you may or may not believe them)

What do you think about yourself? Ex. How do you talk to yourself?

How are you living an authentic life NOW?

How aren't you living an authentic life? AKA The GAP

What is the next step you would like to try?

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FUTURE: WHO DO YOU WANT TO BE? (describe in as much detail as you can)

OBSTACLES:

On a scale of 1-10, where are you on this journey?

1 2 3 4 5 6 7 8 9 10

Why aren't you a 10 already? List all of the obstacles between you NOW and your vision of FUTURE You Living an AUTHENTIC life with Purpose.

Choose 1 to work on, list here (repeat as needed):

How do you want to overcome this obstacle? (List solution here)

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OBSTACLE EXAMPLE EXERCISE: OBLIGATION

WHERE DO YOU FEEL OBLIGATED IN YOUR LIFE?

Where do you feel obligated in your life? (list all the ways)

Out of that list, which do you want to choose for yourself?

What is stopping you from choosing?

To which would you like to say “no, thank you”?

What is stopping you from saying “no, thank you”?

WHAT IS YOUR NEXT STEP?

WHEN ARE YOU GOING TO DO IT?

SCHEDULE IT NOW IN YOUR CALENDAR.

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FAVORITE RESOURCES:

Authenticity by David Posen, MD

Authentic Excellence: Flourishing and Resilience in a Relentless World
by R. Kelly Crace and Robert Louis Crace

Priorities Podcast: <https://successfulgenerations.com/episode059/>

Morning Routine: [Successfulgenerations.com/episode069](https://successfulgenerations.com/episode069)

Michael Hyatt's "Creating a Life Plan"

Beyond Gold: True Wealth for Inheritors by Thayer Cheatham Willis

Dare to Lead by Brene Brown

Untamed by Glennon Doyle

Preparing Heirs by Roy Williams & Vic Preisser

360-degree feedback

The Life Coach School Podcast, Brooke Castillo

Successful Generations Podcast, Ellie Frey Zagel

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NOTES: (add results of other tests here)

WHICH ARE YOU? (circle one)

INTROVERT

EXTROVERT

AMBIVERT