
PATERSON LIFEPLAN PRE-WORK

1 REVIEWING YOUR LIFE DOMAINS

A “life domain” is an area of life in which you live and interact. We have four domains in our life: personal, family, vocational, and community. Taken together, we call these our “Life Domains.” LifePlan is a holistic process. We identify Life Domains to cover the significant areas of your life in a comprehensive way.

◆ PERSONAL

This is the domain of self – your physical, intellectual, emotional and spiritual health and well-being. It foundationally includes your beliefs and core values.

◆ FAMILY

This domain includes parents, spouse, children, and influential extended family members.

◆ VOCATION

This is the domain of your work or career.

◆ COMMUNITY

This domain captures all other important and significant spheres of your life. The Community domain may include friends, neighbors, organizations and clubs. It is here we consider the ways to give back to society at large. This is the domain where some people engage others with a shared belief being the foundation/context of relationship.

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2 YOUR OBJECTIVES

What you hope to gain from something is usually what you will gain. That is why it is important that you identify your objectives at the beginning of this process.

In the spaces below, write a primary statement of your expectation for your LifePlan. In other words, what primarily do you hope to get out of this time?

◆ YOUR PRIMARY OBJECTIVE

What is the primary objective for you? (1-3 sentences)

◆ YOUR SECONDARY OBJECTIVES

For your *personal life domain*, what is your main objective? (1-3 sentences)

For your *family life domain*, what is your main objective? (1-3 sentences)

For your *vocational life domain*, what is your main objective? (1-3 sentences)

For your *community life domain*, what is your main objective? (1-3 sentences)

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3 PATERSON FOUR HELPFUL LISTS

The following *Four Helpful Lists* tool will help you evaluate where you are currently in regards to the domains of your life. Take time to thoughtfully reflect, assess, and answer the four questions for each domain in the chart below. Identify what is right in each domain. It may not be perfect, but it is right and needs to be optimized. Some things are wrong and need some form of change. Other things are confused (not necessarily right or wrong) and need definition or clarity. Where you feel something missing that needs to be added, identify the void. Remember, you don't have to solve anything right now.

LIFEPLAN DOMAIN	What is right?	What is wrong?	What is confused?	What is missing?
Personal				
Family				
Vocation				
Community				



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ENGAGING YOUR LIFE CIRCLE

If we were to isolate one variable as the primary determinant of the successful implementation and management of a LifePlan, it would be the community that an individual institutes around themselves. By the end of our time together, we will have created a strategic, actionable plan. Tom Paterson would often say, “Plans don’t self-execute.” As you set out to be the truest version of yourself and make your greatest contribution, who are the people you need to surround yourself with?

Our *Life Circle* is comprised of trusted voices and relationships to support and encourage us, as well as challenge and correct us as we endeavor to stay the course of authentically living our LifePlan. Ideally these people have already done their own LifePlan but at a minimum, these should be people who have an appreciation for this kind of work (not everybody does and that’s ok!) and whose voice you value and trust. The label or title for each relationship is far less important than the context of the relationship. For example, some have negative or uneasy connotations attached to the terms mentor and protégé.

- ◆ *Life Purpose Partner (1 person)* – Your *LifePlan Partner(s)* is a person (or persons) with whom you will share all of your LifePlan and meet with on a regular basis (monthly is great) with the objective of reviewing and staying on track with the plan you’ve laid out. This person may be a spouse or a trusted friend and the relationship is marked by both safety and trust. If your spouse is a good fit here, also consider somebody else to alleviate the pressure on the spousal relationship.

- ◆ *Mentors (1-3 people)* – Typically, your *Mentor(s)* are further along the path of life than you are today and are a picture of who we would like to be or what we would like to have in this life. We pursue our mentors for their wisdom and help as we execute our plans, often in specific areas. A helpful way to engage a mentor is to invite them to coffee or to lunch to ask thoughtful questions and invite conversation about specific topics (leadership, business, navigating relationships, mindset, raising children, engaging community, etc.). You might share all or only specific parts of your LifePlan.

- ◆ *Close Friends (1-4 people)* – *Close Friends* are people with whom we have a fair and mutual exchange in relationship. As we share all or part of the details of our story and our newly minted plans, we ask these people to challenge our assumptions and encourage our progress, while we introduce and educate them to the perspective and process of LifePlan.

- ◆ *Protégés (1-3 people)* – We see value and potential in our *Protégé(s)* and take time to invest in them, offering them our learnings and means of gaining perspective from our LifePlan. In this relationship, we share what we have learned about life and invite them to share their life.

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④ ENGAGING YOUR LIFE CIRCLE

- ◆ What do you hope I gain from my LifePlan?

- ◆ What are the specific qualities and attributes you love and value most about me?

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TURNING POINTS

In the Turning Points tool, we will explore and gain perspective on how you got where you are today in terms of how you think, live and relate in the world. Please take some time prior to your LifePlan to reflect on your life and its “turning points.”

A turning point is an event, episode, experience, opportunity, threat or person that “turns” our life in some way. They can be self-induced – that is, created by our own decisions – or externally driven by an occurrence that happens to, or around, us. In other words, this is a time in life when our life came to a point where the direction in at least one Life Domain (Personal, Family, Vocation, Community) was completely altered, or “turned” in a different direction (either immediately or as it played out over time). This change can be a drastic turn (examples would be marriage, divorce, first child, death of a loved one), or they can be more subtle (a conversation with a person that stuck with you and changed your perspective and trajectory over time, a family vacation, team you made, coach you had, etc.).

Ultimately, as you consider each event, the question to ask is “How did this ‘turn’ my life?” We can have significant life events that don’t end up in an actual change of our thinking, behaviors, or trajectory. By contrast, we can also have seemingly small incidents that do in fact turn our lives and set us on a different course.

On the following pages, list possible turning points in your life. As best you can list the age, the turning point, and the specifics of the turn, capturing the internalized messages, changes in paradigm or behaviors. An example might be: Age 14 – Turning Point: Parents divorce – Specifics: Home no longer a safe place; I side with Mom; started drinking. Another possibility might be: Age 17 – Turning Point: Coach Turner – Specifics: I’m told I’m a leader for the first time, Confidence awakened, set me on a course to lead people.



