

Personal Aspirations and Company Purpose Worksheet

Instructions

Below are three exercises to clarify your personal aspirations. This will determine the purpose of your company. You can do all three or pick one or two. You will then take your thoughts from these exercises and identify the aspirations that are most fulfilling and motivating to you.

Your Dream Company

Imagine you woke up tomorrow to the life and company of your dreams. You could be anything, do anything, or have anything you ever dreamed. Your company and your role in your company perfectly fulfill your definition of a dream life. Think through the details of what your life and work would be like.

- Describe what you would be, do, or have. What exactly do you do or have? What has changed about you that proves to you that you woke up to your dream life and company?
- For things you do or have, dig a little deeper. Why do you want those things? What desire does it satisfy? Start your answers with the phrase "to be" or "to have." This helps clarify your underlying motivation. You may find that you can keep asking "why" or "to be" through multiple layers to get to your true underlying aspirations.

Your Wonderful Life

In the movie "It's a Wonderful Life," the main character played by Jimmy Stewart is shown how the world would be worse off if he hadn't lived. He suddenly sees all the ways he made the world a better place.

Imagine you've lived the life you've always wanted to live. For this exercise, don't dwell on your life now, but everything you hope it to be. You're able to see what you did in your life and how your life impacted others.

- What would be missing if you hadn't brought it to this world?

- What would you hope people say about what you did and who you were?
- What parts of what they say make you most proud?
- If you had made a story about your life, how would you describe your life to others?

Anger and Guilt

The first two exercises are very powerful despite asking hypothetical questions. This exercise focuses on your actual past and your deepest feelings. You'll explore two extremes:

1. Think about times when you have been angry or guilty. Guilt arises when you violate your values, and anger occurs when someone else violates your values. What triggered those emotions? What values or beliefs were violated?
2. Think about times when you have been the most grateful, proud, or satisfied. What triggered those emotions? What values or beliefs were honored or met?

Your Personal Aspirations: Be, Do, Have

From the exercises above, what are the top five things that you aspire to be, do, or have. Here's a little more guidance on what would go in each category:

- To be: These are usually character traits like loving, forgiving, giving, enthusiastic, etc.
- To do: Here is where you outline what fills your day that provides fulfillment and purpose for you. It may also describe how you act during the day. For example, one of my "to do" items is "Laugh and not take myself, or life, too seriously."
- To have: Include both tangible and intangible things. It may be a lake cabin, enough money for security or fun, health, etc.

There aren't clear boundaries of what goes in each category. Items could apply to more than one category depending on how you phrase it. The important thing is to capture and document what's important to you.

Integrity and wholeness are being the same person and living the same values when working in your business and how you spend time outside the business. Include aspirations that are fulfilled or occur in both areas of your life. For example, taking care of others may be an aspiration. You may do this by taking care of your family or by taking care of your employees. List these in the worksheet on the next page.

Your Company's Purpose

Now you will list how your company will allow you to achieve these aspirations. Not all aspirations will have ways your company will support it. On the other hand, nothing your company does should detract you from your aspirations.

At this stage, you are just listing ideas. These ideas will be further sorted and refined in the vision stage of the strategic planning process. The purpose of a business is to serve its owners. These are ways it will accomplish that.

Note: See also *Facilitating Financial Health* by Klontz, Kahler, and Klontz or *The E-Myth Revisited* by Gerber for similar methodologies.

I Aspire To Be...	To Achieve This, My Company Will...

I Aspire To Do...	To Achieve This, My Company Will...

I Aspire To Have...	To Achieve This, My Company Will...