

Roadmap to Meaningful Midlife®: Create Your Vision and Action Plan

**A step-by-step workbook designed for you to
create your vision and specific action plan
for a fulfilling midlife!**



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Roadmap to Meaningful Midlife

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INTRODUCTION

Welcome to the Roadmap to Meaningful Midlife Program! We're excited that you have chosen to explore and plan for this next phase of your life.

Here are a few tips to make the most of your investment:

What's important is that you GET STARTED taking action for this next phase of your life using the tools available to you in this program. Set a time this week on your calendar to begin! This program will be easy if you chose amounts of time that work for your schedule and the variations in your lifestyle. Even if you spend ten minutes, you'll start making plans for your future and building your momentum. We recommend that you make planning a habit by setting a time in your schedule each week for taking one more step in the program. When you complete this week's step, get out your calendar and set your next week's planning session. And if something gets in the way, be sure to set another time for your next planning session.

Here are a couple of options to most effectively use this program:

- f* Listen to the audio program first, a track at a time, to get familiar with the concepts and process that you will be going through. Remember, you can do this in a way that fits the time you have in your schedule each week. Then print out the workbook from the workbook file and work through the process one section at a time. You might find it useful to replay the audio tracks for areas that you want to clarify.

- f* Alternately, you may print out the workbook from the workbook file and listen to each track on the audio followed by completing each corresponding section of the workbook.

Both are effective ways of creating a vision and an action plan for this next phase of your life. What's important is that you JUST GET STARTED, TAKE ONE STEP AT A TIME, AND MAKE PLANNING FOR YOUR LIFE A HABIT!

You are also encouraged to talk about this program with someone who will support you as you go through this process. Choose someone who will support you in having what is important for you in your life. Also, think about who you will ask to hold you accountable for taking the steps that you identify as you go through this process. Call at least one of these people today and ask them for their support in holding you accountable for spending time each week for your life planning. Create an agreement about how and when you will contact them with your progress. We suggest that you set a timeframe for completing the Roadmap to Meaningful Midlife program and that you share the deadline with your accountability partner so that you commit to a completion date.

You may also choose to complete this program with your spouse or significant other. Our experience of working with couples is that each individual ideally should first complete each exercise independently. Afterwards, you can share your experiences and visions with each other and discuss your similarities as well as differences. Then, the final step would be to create your common vision and action plan to achieve your common goals together. Don't forget that your

individual goals are equally important in supporting you as a fully contributing partner in your relationship!

We are Certified Professional Business/Life Coaches who help individuals, couples and organizations achieve their desired results. We're really passionate about helping **you** explore what's next in your life and create a specific plan to help you get there. This program is based on the most effective tools and processes that hundreds of our clients have used with great success. Both of us will guide you through the program so you will receive the benefit of both of our perspectives.

Here is what you will experience during this program:

- f* Establish a baseline of where you are now in your life planning and identify your areas of strength and concerns
- f* Explore and create a vision of your midlife
- f* Begin to build a concrete picture of how you want your midlife to be
- f* Develop a plan to achieve your vision using a defined process you can reuse as your life changes
- f* Refine your goals and identify specific actions/structures to support you achieving your vision
- f* Address obstacles that can get in your way and determine strategies for keeping you on course

We hope you enjoy the journey and look forward to hearing from you about your successes!

To your success,



Mary Radu



Cheryl Mann

ESTABLISH YOUR PLANNING BASELINE

We're at the beginning of your life planning process. This is a good point in time to define where you are in your planning process today, which we'll refer to in this program as your baseline. A baseline is an important part of the process in order to determine your current status from which you will be able to measure your progress. You'll be using your responses in a later part of this program including the final segment.

Take a few minutes now to answer the following questions as they relate to you and where you are today.

BASELINE FOR MIDLIFE PLANNING

Today's Date: _____

Describe where I am today in my midlife planning:

What are my biggest concerns or issues about midlife?

What do I hope to achieve from completing this planning process?

Using a scale of 0 – 10 (10 being the most prepared), how prepared am I in planning for my meaningful midlife? This is my “baseline” number: _____

CREATE A CONTEXT FOR YOUR MEANINGFUL MIDLIFE

Today, you have the potential for living a longer and healthier life than did individuals in earlier generations. In the last 90 years, the average lifespan in industrialized nations has increased by 30 years! Now, many people at this stage of life can expect to live as many as 30 to 40 years in a “Midlife and Beyond” stage of life.

Along with longer, healthier lives come new possibilities. Many people find that as they reach their 40s, 50s and 60s that this time is the most exciting and fruitful period of their lives, a time when all of the skills, experiences, and wisdom that they’ve collected up to this point really come together.

During this time, some big questions begin surfacing: what am I here for, what do I want to accomplish, where do I want to go from here and what do I want to leave behind? What we know from our research and our own experience with clients like you is that introspection and planning during this transition can overcome the fears and can replace it with a sense of energy and fun and can create the results that you most desire for the second half of your life.

By participating in this program, you’re recognizing that your life is changing and that you’re choosing to take conscious action and be proactive about your future - this is a courageous act! You could have taken the easy route by avoiding any planning and doing something else with the time that you’ve set aside to complete this program. Being courageous has an impact on not only you but also the people around you – not only will you benefit from this program, but think about all the other people in your life who will benefit as well.

Recognize that this will be a process that you’re starting now and your life will probably change during the many years ahead of you, so your planning is an evolving process. In this program, we’ll be giving you some tools to take the next steps in your planning and that you can use as your life evolves.

You will also have the opportunity to explore new ideas and new options for you to consider for your future. Given the resources and the realities that you have, you’ll look at what CHOICES you want to consider for your future life.

We’re going to be focusing on how to keep on track during your journey: How to get moving, get unstuck, stay unstuck! And take positive action!

Here is some space to jot down any additional thoughts you have about what this next period of life might mean for you:

Let’s get started on developing your Roadmap!

ASSESS YOUR CURRENT LEVEL OF PREPAREDNESS

To get started with the next exercise, choose a date that is one to five years in the future that you want to focus your planning toward. This is the date by which you want to have certain conditions be true in your life – when major aspects of your life will be as you wish them to be by this date. This date is the one that you will be focusing on with all the activities during the remainder of this program.

Choose a date that is far enough out so that you will have had enough time to make the major changes that are important for your future. For instance, three years from now you may want to have:

1. Made a career change to a more fulfilling role in your company
2. Your financial plan in order to support your retirement goals
3. Found new interests to fill the time which you previously used for supporting your children who have left home

Choose that date one to five years from now and place that date below.

Future date (day/year) that I am planning for: _____

In the next part of this exercise, we'll use a tool to get a snapshot of how satisfied you are with major areas of your life.

ABOUT THE AUTHORS

We are Certified Professional Coaches who work one on one with clients and with organizational groups/teams to help them achieve their desired goals. We love supporting individuals and organizations who are seeking to consciously create their desired results. We invite you to contact us to explore coaching or workshops if you sense that this type of support would help ensure success for you or your organizations. We look forward to hearing how we can support you moving forward on your road to a meaningful midlife!

If you've enjoyed this program, we hope that you will tell your friends and colleagues about how this program has supported you. They can purchase their own personal copies at www.roadmaptomeaningfulmidlife.com and www.pathmakercoaching.com. As you've already experienced, having the support and structure of a program like this can make a very big difference! Having a step-by-step process with experienced guides to help you along the way can keep you on your path and make your journey easier and much more enjoyable.

Mary Radu, MS, MSW, CPCC, is a Certified Coach and Philanthropy Consultant. Mary helps midlife individuals and couples live a meaningful life by discovering how to share their unique gifts and resources to be positive change makers. Mary inspires and supports her clients to uncover their values and motivations that lead to fulfilling choices and greater impact in the world through their career, philanthropy and lifestyle.

Mary is the co-author of **Roadmap to Meaningful Midlife®** Audio/Workbook Program, the **Philanthropy from the Inside Out** Program and founder of **Pathmaker Coaching**. She is a pioneer in the emerging "Third Age and Midlife Transitions" field specializing in midlife career and lifestyle transitions, especially for those in the "baby boomer" age group.

Mary's own professional transitions have led her through 28 years in the fields of human services, manufacturing, health care and information technology. She has held training, program development, management and consulting roles, and developed a successful health care consulting business. Like many of her clients and professional colleagues, Mary has experienced career and lifestyle changes, divorce, cared for aging parents and discovering the right opportunities for her to "give back". This has deepened her compassion, guiding clients to walk their unique path. Get immediate tips and resources for career, philanthropy and lifestyle options at www.PathmakerCoaching.com or contact her at mary@pathmakercoaching.com 707.824.8836.



Mary Radu

Cheryl Mann, MBA, CPCC, ACC is the President and Founder of **Goals InSight, Inc.**, an organization that specializes in helping organizations and their teams make the changes needed to achieve powerful results. Cheryl Mann is an organizational team development coach, speaker, presenter and workshop leader for public and industry events, conferences, and corporate meetings and off-site retreats on the topics of team building, leadership development, goal setting, change management, and work-life balance, having delivered hundreds of workshops and speaking engagements on these topics.

Prior to launching Goals *InSight*, Cheryl had 16 years of "Corporate America" experience which included executive client relationship management, information systems, hospital and health plan experience, meeting facilitation and education/training. For more information about Goals *InSight*, Inc. you're invited to contact Cheryl at (510) 482-2987 or visit the web site at www.goalsinsight.com.

Note from Cheryl: Neither I nor any coach I know is immune to the discovery and life change process. Through this Roadmap journey, I have chosen to take a different business path that will require my full attention. Mary and I remain in close contact. I am excited that she will be guiding the continued Roadmap journey with the knowledge that we have created a life-changing program that is unique and has profound impact.



Cheryl Mann