

Action Plan Worksheet

Welcome to your Action Plan Worksheet! Here, you'll apply a simple 6-step process to create concrete goals for every area of your life. Begin by revisiting your vision and challenging any limiting beliefs that stand in your way. Then, use positive psychology tools, affirmations, and a clear mission statement to build momentum. From setting a SMART goal to blocking out dedicated time and engaging the right support, you'll design a personalized roadmap for success in any area you choose.

Your Vision:

Take a fresh look at the **vision** you've set for the spheres of your life—be it your **mind, body, finances, relationships, fun and adventure, or service.**

How will this action plan fit into your vision? How will it support it?

Trust Through Belief and Positive Psychology

1. Rewrite your story: Challenging limiting beliefs

Reflect on your old story and rewrite it by exploring the limiting beliefs that may be hindering your progress. Start by identifying the source of these beliefs and questioning their validity—are they based on facts or assumptions? Test their reality by examining evidence for and against them, and look at the situation from alternative perspectives. Consider how these beliefs have influenced your actions and outcomes, and think about what you might be missing by holding on to them. Challenge yourself by imagining the worst- and best-case scenarios, and reframe the limiting belief into a positive and empowering one.

Identify the Source

Where did this belief come from?

Is it based on a specific experience, or has it always been present?

Test the Reality

What evidence supports this belief?

What evidence contradicts it?

Am I relying on facts or assumptions?

Explore Alternative Perspectives

If I were giving advice to a friend who held this belief, what would I say?

What might someone without this belief think or do differently?

Examine Consequences

How does this belief affect my actions and outcomes?

What opportunities might I be missing because of it?

Consider Worst-Case and Best-Case Scenarios

Worst-case: What's the most negative outcome if I challenged this belief? Would it really be that bad?

Best-case: What could I gain by letting this belief go or testing its limits?

Reframe and Rewrite

How can I transform this limiting belief into a positive, empowering statement?

Write a new, uplifting version of the old story.

2. Write your mission statement: A mission statement anchors your vision and decisions.

Focus on what you value most and why this goal matters to you, using concise, present-tense language that inspires action. For example:

“I am financially free, living with purpose, and using my resources to benefit myself and others.”

3. Support your beliefs with affirmations and visualizations.

Choose wording that feels uplifting and relevant to your goal, and frame it in the present tense as though you’ve already achieved it. Keep it simple, repeat it daily (aloud or in writing), and pair it with visuals or emotions that help you truly believe in its truth. By doing this consistently, you’ll train your mind to focus on what you *can* achieve instead of what might hold you back. For example:

“I am confident, capable, and consistently moving closer to my goals.”

4. **Make a commitment: When you say, “I will...,” you’re solidifying your dedication to a specific course of action.**

This commitment is a promise to yourself—a clear, forward-moving declaration of what you intend to do. For example, “I will spend 30 minutes every day working on my business idea to bring it closer to reality.” The more concrete your promise, the easier it is to follow through and measure your progress.

Applying the 6 step process

Your Goal—What?

Now, **translate** your vision into a **SMART goal**: one that’s **Specific, Measurable, Attainable, Relevant, and Time-bound**.

For instance, if your sphere is **finances** and your vision is “Build greater financial freedom,” you might define a SMART goal like:

“I will save \$300 per month for the next 12 weeks by reducing takeout meals and selling unused items, ultimately having \$900 set aside by the end of 12 weeks.”

This example has a **clear target** (\$900 total in savings), a **specific timeframe** (12 weeks), and a **measurable action plan** (saving \$300/month). By crafting a goal that fits this format, you give yourself a **tangible endpoint** and **practical steps** to get there.

Set a clear goal:

Why Do You Want It?

Write a statement: “I want this because ...”

What Will Be Your Reward?

Reward yourself for staying on track or achieving the goal.

Set a reward, but keep it small: “If I go to the gym the entire week, I’ll treat myself to a smoothie after.”

Dedicated Time—When?

Review your time blocking and reflect on the time you have. Choose a regular time to work on your goal. For example: Every Tuesday after work, between 6 pm and 7 pm.

What You Need to Do—How?

1. Reverse engineer the goal
Set weekly milestones.

Break down the milestones into actionable steps that you can complete within each time block

2. Prioritize

The 80/20 Actions - what are the actions that will take you closest to success?

3. Refine your habits

Which habits do I need to build?

Which habits do I need to stop?

Which habits do I need to continue?

Which habits can I stack on top of others?
Which existing habits can anchor my new habits?

Which habits can I replace with better ones?

4. Focus on "where"

What would be the best environment to increase my chances of success?

How do I eliminate friction?

How do I eliminate distractions?

Who Could Help Me Achieve This Goal?

Mentors

Offers guidance, shares experience, and helps you anticipate obstacles.

Support

Provides emotional encouragement and practical tips—friends, family, or online communities.

Accountability

Keeps you on track by checking in regularly—could be a buddy, coach, or mastermind group.

Funding

Supplies financial resources or connects you with potential investors—if your goal requires capital.

Promotion

Helps increase visibility—consider marketing specialists, social media influencers, or brand ambassadors.

Even if you only list one or two names for each category, you'll have a clearer idea of where to seek help when you need it.

Track Your Progress

- 1. Set your leads

- 2. Set your lags

Planning for Challenges

What potential challenges might I face?

How can I overcome them?

Consider the Tools and Resources You'll Need

As you work on your action plan, reflect on which tools and resources could streamline your path—whether that's habit-tracking apps, budgeting software, online courses, supportive communities, or expert guidance. You can also leverage AI to brainstorm not only fresh ideas but also to discover and evaluate the best tools and resources for your

goals. The right combination will simplify your tasks, maintain momentum, and keep you focused on what truly matters.

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