



**ACTION PLANNING TOOL
FOR LEADERS**

BE WELL LEAD WELL® ACTION PLANNING

The insights you gain from *Be Well Lead Well Pulse®* can be powerful. Even more powerful is turning those insights into actions that matter to you. Use the following planning tool to support your wellbeing journey.

- 1. **CURRENT REALITY.** Review your personal *Be Well Lead Well Pulse®* findings. What do the findings say to you?
- 2. **VISION AND GOALS.** Based on your *Be Well Lead Well Pulse®* findings, what results would you like to create or areas would you like to improve? In other words, what shift in your consciousness or capabilities would be most worthwhile to you as a leader and whole human being?
- 3. **OPTIONS FOR ACTION.** Based on your response to Question #2, brainstorm a list of actions to help you elevate your life and leadership.
- 4. **THE RIGHT ACTIONS FOR RIGHT NOW.** So many possibilities! Review the actions you generated in Question #3 with these questions in mind:
 - Which actions are most energizing for me?
 - Which actions are most aligned with my personal needs and leadership style?
 - Which actions help me role-model my commitment to thriving?
 - Which actions help me create a culture that invites others to thrive?

Put your favorite actions into the first column of the table on the following page. Deciding where to put your precious energy is as much art as it is science. Use a little of both to rank each potential action.

THE SCIENCE: Think of each possible action as a gold nugget you place on a scale. The ones that carry the most weight will meet most of your criteria most of the time. In this case, your simple criteria are:

- Impact: This action will produce a good return on investment of my time and energy.
- Ready: This is the right time for this action right now.
- Willing: I’m truly inspired to take this action. I get excited thinking about how it will affect me and others.
- Able: I have the right skills, support, and resources to implement this action right now.

Rate each possible action on a 1–5 scale for each criterion. A “1” means it doesn’t meet that criterion at all while a “5” means it aces the criterion. Add up the scores. The higher or “heavier” the score is, the more weight that action carries.

Action 1	
Critical Activities	
Barriers	
Who to Involve	
Aligning for Support	
Measuring Progress	

Action 2	
Critical Activities	
Barriers	
Who to Involve	
Aligning for Support	
Measuring Progress	

Action 3	
Critical Activities	
Barriers	
Who to Involve	
Aligning for Support	
Measuring Progress	

7. CELEBRATE! You made remarkable progress in building your plan of action to uplevel your wellbeing and leadership. Now it's time to put it to use!

"Today's complexities are our opportunity to unleash human potentials to grow, evolve, and thrive, individually and collectively. Be Well Lead Well® empowers leaders with insights and tools to tap into these potentials within themselves, as well as in the people and teams they lead."

— RENEE MOOREFIELD
CEO, WISDOM WORKS GROUP



BY WISDOM WORKS GROUP INC.



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