



LIVE RETREAT  
**WORKBOOK**



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LEADERSHIP MENTOR AND SPEAKER

# FORUM RETREAT PREPWORK

Hi, I'm Dave & I'm so excited to work together.

Welcome to your pre-retreat introduction! This booklet will introduce you to the work we will be doing together in the coming months. Completing these exercises from your personal perspective *first* is the best way to understand how we can adapt the use of this personal work to contribute to creating some collective work that will serve the Forum.

I'm looking forward to meeting each of you and talking about your most important **identity values**. This will help you get to know one another and to determine the core values and deeper purpose of your Forum Group. The exercise on **competency values** will introduce some of the strengths you bring to your business and the forum group. Understanding these helps us shape a clearer mission for your group.

## The Pathway

Purpose



Who am I?

Mission



What should I do?

Vision



Where am I going?

Roles



The big ones in life.

Goals



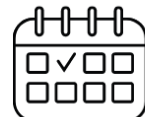
All roles have goals.

Tasks



Goals need tasks.

Calendar



Tasks populate your calendar.





# LIFE PURPOSE

## EXERCISE #1

**GOAL:** To create the values foundation of a life purpose statement.

**COMPLETE:**

1. Watch the introduction video on values + virtues (10m 36s).
2. **Select your top 3 identity values.** You will do so by completing the exercise linked here.
3. Watch the stacking game video (5m27s) + complete the exercise described (video examples of the exercise linked here, 4m50s).
4. **Define your values.** Describe what each of your identity values means to you in your own words + using what you explored in the stacking game.



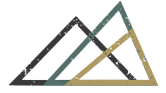
**45 min**

+ 21 MIN OF  
VIDEO

NAME

DATE

# MY IDENTITY VALUES



IDENTITY VALUE #1: \_\_\_\_\_

VALUE DEFINITION:

IDENTITY VALUE #2: \_\_\_\_\_

VALUE DEFINITION:

IDENTITY VALUE #3: \_\_\_\_\_

VALUE DEFINITION:

Optional Journal Prompt: When am I most grounded?  
How does it feel?





# LIFE MISSION

## EXERCISE # 2

**GOAL:** To create the foundation of writing your life mission (what we are here to *do*).

**COMPLETE:**

1. Watch [the video here](#) on competency values (6m 04s).
2. Complete the [exercise linked here](#), and choose your **top 3 competency values**.
3. Watch [this video](#) on the past, present, and future exercise you will do next (3m 36s).
4. Use the next worksheet (or your own journal) to write down your competency values. Then, consider how you've used these values and how they've shown up in the **past, present**, and how you want to embody them in the **future**.

**45 min**

+ 10 MINUTES  
VIDEO

# Past, Present, + Future Exercise



In the space provided, write down your competency values. Underneath, write just a few sentences or words describing how you expressed this value or how it showed up in the past. Next write how it is showing up at this time in your life. Finally, write how you'd like to see it manifest in the future.

Competency Value #1:		
<b>Past</b>	<b>Present</b>	<b>Future</b>
<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>

Competency Value #2:		
<b>Past</b>	<b>Present</b>	<b>Future</b>
<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>

Competency Value #3:		
<b>Past</b>	<b>Present</b>	<b>Future</b>
<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/> <hr/>



# CONTACT

## HAPPY TO HELP

If you have any questions regarding content leading up to the retreat, do not hesitate to reach out - we are here to help lead you along the way and make the experience as rich as possible.

Olivia will be your primary contact leading up to the retreat, and she will be able to answer, or help direct you to the answer, of any questions you may have.

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