

A FREE WORKBOOK

# The Balance Plan™

BY LAURIE GERY  
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# WELCOME

Laurie Gery is the founder of The Balance Plan<sup>®</sup>, a personal and career growth coach and speaker. As a valuable leader in the team building space, Laurie has taken over 20 years of high-level experience in the corporate industry and instilled it into simple, yet easy to learn techniques for her coaching clients to build success for themselves.

*Laurie Gery*



# How to Use This Exercise:

Keep it quick and honest: Don't overthink your answers—just jot down how you're feeling right now.

No right or wrong answers: This is for you to reflect and take actionable steps toward balance.

Use it weekly: Look at your answers each week to identify where adjustments can help reduce overwhelm.

*Questions?*

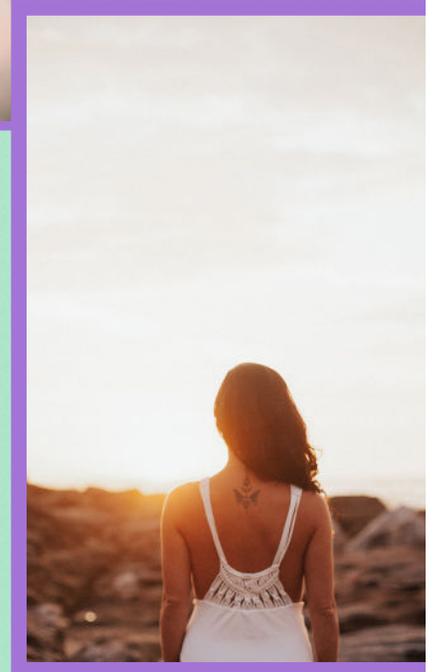
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# Things To Consider:

- **Prioritize Yourself:** Even 10 minutes of personal time can shift your perspective and reduce stress.
- **Recognize Obligations vs. Expectations:** Identify what's truly necessary versus what you feel you should do for others.
- **Speak Up:** Practice saying "no," setting boundaries, and communicating your needs to others.
- **Avoid Defaulting to "Yes":** Take a moment to think before agreeing, especially with family, friends, or coworkers.
- **Create Space:** Delegate tasks to free up time for what matters most and reduce mental clutter.
- **Identify Overwhelm:** Whether it's work, parenting, or other areas, pinpoint where stress is building up and take small steps toward easing it.





# WEEKLY BALANCE CHECK-IN



*REFLECTING ON YOUR PAST WEEK,  
CONSIDER THESE QUESTIONS:*



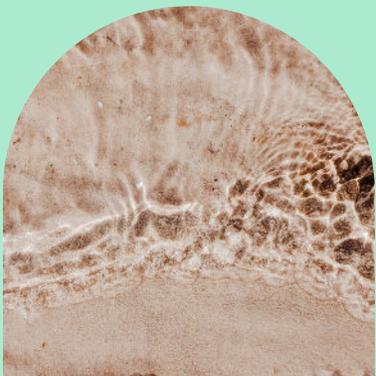
*DID YOU SPEND AT LEAST 30  
MINUTES DOING SOMETHING YOU  
ENJOY?*

- A. YES
- B. NO



*HOW OFTEN DID YOU ENGAGE IN  
ACTIVITIES THAT WERE  
OBLIGATIONS TO OTHERS?*

- B. VERY FEW
- C. ABOUT 50/50
- D. A LOT



*HOW WELL DID YOU SPEAK UP FOR  
YOURSELF THIS WEEK?*

- A. GREAT
- B. COULD HAVE DONE BETTER
- C. NOT AT ALL



REFLECTING ON YOUR PAST WEEK,  
CONSIDER THESE QUESTIONS:



WHAT'S ONE THING YOU CAN SAY "NO"  
TO OR DELEGATE NEXT WEEK?(EVEN IF  
JUST FOR ONE WEEK—START SMALL!)

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WHAT AREA OF YOUR LIFE FEELS MOST  
OUT OF CONTROL RIGHT NOW? (WORK,  
PARENTING, FINANCES, ETC.)

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SPEND 5-10 MINUTES BRAINSTORMING  
ONE ACTION YOU CAN TAKE IN THAT  
AREA TO MAKE YOUR LIFE EASIER. WHAT  
SMALL CHANGE COULD MAKE A BIG  
DIFFERENCE?

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NEED MORE INSIGHT & SUPPORT?

# Schedule your **FREE 30 minute** consultation today.



I look forward to meeting you on the first step in your journey to unstoppable balance.

Together, we will look at your current challenges. You'll walk away with some quick tips and a recommendation on a path forward.

*Laurie Gery*

**SCHEDULE YOUR FREE 30**  
**MINUTE CONSULTATION HERE**