

THE SUMMIT PLAN: VITALITY AUDIT

A Strategic Assessment for the Executive Transition

Name: _____ Date: _____ Current Mission: _____

PHASE 1: OPERATIONAL CAPACITY (The Machine)

High-performance leadership is predicated on physical sovereignty. If the hardware fails, the software is irrelevant.

Performance Metric	Current Status (1-10)	Target Benchmark
Functional Mobility		Can I engage in high-impact activity without extended recovery?
Systemic Composition		Am I at my optimal "performance weight" for my frame?
Cognitive Recovery		Is my sleep data showing a consistent "Ready State"?
Sustained Output		Do I maintain "Peak Energy" throughout the entire afternoon?

The Executive Insight: Identify the one physical friction point currently limiting your daily output.

Primary Constraint: _____

PHASE 2: THE "DRIFT" ANALYSIS (The Succession of Self)

In business, we plan for succession. In life, we often fail to plan for the "Vacuum" that follows a career exit.

Audit your current lifestyle against these high-risk indicators:

- My "Identity" is still 80% or more tied to my former professional title.
- I have "Free Time" but lack a "Mission-Critical" objective to fill it.
- I have defaulted to "Maintenance Mode" rather than "Growth Mode."
- I lack a pursuit that requires a **Flow State** (Complete immersion/High Challenge).

The Strategic Pivot: If your current professional "Why" disappeared today, what is the **Objective** that would command your focus tomorrow morning?

Answer: _____

PHASE 3: LIFESTYLE ARCHITECTURE (The Essentialist Filter)

Complexity is the enemy of execution. We apply the 80/20 Principle to your post-executive life.

1. **The Fulfillment ROI:** List your top 5 recurring activities. Circle the **one** that provides 80% of your current life satisfaction.
2. **The Minimalist Shift:** High-achievers often "own" too much to be truly free. What is one legacy commitment or physical asset you can divest from to increase your **pivoting speed**?
 - **Action Item:** _____

PHASE 4: THE SECOND ASCENT ROADMAP (The Next 90 Days)

Execution is the only differentiator. Define your next three strategic milestones.

- **Objective 1 (Physical Performance): ***

- **Objective 2 (Intellectual/Professional Growth):**

○ _____

- **Objective 3 (Legacy/Impact):**

○ _____

The Final Assessment:

"Success is the first mountain. The Second Ascent is about Significance. It's the shift from building a machine to being the master of your own. Audit the data, implement the changes, and I'll see you on the trail."