

March 30, 2011 Open Mic Recap “Your 2011 First-Quarter Appreciative Review”

Audio of April 20, 2011 Open Mic Available: Click [here](#) for an audio recording of April 20 Open Mic with Marty Kurtz, CFP®, FPA President. You can also use the playback line, 1- 951-262-4949, passcode 522594#.

March 30 Open Mic Highlights:

A group of us discussed progress-to-date on our 2011 first-quarter goals. We had two very interesting – and very contrasting – reports of how participants approach goal planning, and I reflected on my own 2011 planning and implementation, and how it had vividly demonstrated the importance of having an inspiring and motivating vision behind specific goals and actions.

Recap:

Background of Today’s Topic: Given the date (the end of first quarter 2011) and the venue (Open Mic as a gathering place to focus on matters that matter), what better time and place to look at how 2011’s first 89 days have gone, and hit “Refresh” on our intentions, hopes, goals, and action plans? I offered these five questions for self-reflection, and invited Omers to share their responses. (You might take a moment now to ask yourself these questions.)

1. *What were some grand intentions I had for 2011, when it began?*
2. *What actions have I taken to 'make them so?'*
3. *How has it worked out thus far?*
4. *Causes for celebrations? Positive surprises? Reasons to re-calibrate and re-launch?*
5. *Lessons I've learned, that I'd like to share?*

Two participants shared their stories; their accounts were fascinating in themselves, and provided a remarkable contrast in style, method, and content.

One planner, a solo practitioner, described her goal-setting process, learned in a MasterMind group some years ago. She documents goals for the year in her professional and personal life, and develops specific action plans and timelines for each. Two aspects are especially notable: **One:** she has a “buddy” (a planner in another region of the country). The pair shares their respective goals and plan, and they hold each other accountable via teleconference every 6-8 weeks. They are serious goal-setters and – trackers: they refer to goals by number, go down the list and, I sense, ask a lot of “why not” and “what’s your plan?” for actions not taken. (I also sense that they offer a lot of celebratory support for actions taken and milestones reached). This kind of mutual accountability is key to successful goal attainment. **Two:** the size of her goal list was large: 16 professional and 14 personal goals! Depending on one’s personality, working habits, and other factors, this breadth could be energizing (as it appears to be for her) or daunting (as it would likely be for me). In any case, I was impressed with both aspects – the accountability arrangement and the goals’ sheer size and scope.

Some of her **personal** goals: attending two yoga workshops/week; visit each of her children and host them each year; participate in one “girl friend event” per month. **Professional goals** are as concrete as “design and obtain new business cards” and as large as “finish writing the book.” * She noted that as one goal is reached, it often morphs into another; for example, making a well-received presentation on her new book (one of her goals) led to an unanticipated invitation to present at a conference (which led to a set of new goals involving preparation, etc.) For information on *Moving Forward on Your Own: a Financial Guidebook for Widows*, go to <http://www.kathleenrehl.com/>. (She sent me a copy, and I was very impressed with its design, tone, sensitivity, and practicality.)

The second planner’s situation, firm, and goal process differed dramatically from the first. Her firm offers financial life planning, with a special expertise in later life planning (assisting older adults plan for the effects of aging and chronic disease and receive services so they may remain independent and in control for as long as possible). She was accompanied by five of her team members, representing investment management, financial planning, marketing/branding and the Age in Place program: an Open Mic record, doubling the next-highest total of people from the same firm. She said, with obvious pride, that her longtime vision for this firm was coming together, with the assembling of her team. She noted that the longtime dream of a firm combining life planning and later-life planning (she is an R.N. as well as a CFP®) was “carried around in my head” and with less documentation and specification of goals than our first planner. She described a recent case of an elderly couple (85 and 81); for whom her firm advocated and obtained in-home geriatric care management (“... an alien concept here in the South”) – thus avoiding a nursing home. One of her goals for the team was to introduce them to Appreciative Inquiry, as a potential approach to client service and the overall culture of the firm; hence their presence on today’s call. (I had trained and mentored her in the Kinder Institute’s EVOKE process; she appears to have caught the appreciative bug from me.) We spent less time discussing the goal-planning process her firm now uses, but it was clear that she welcomed having “team members who are more systematic and organized than I am”. Her personal goals include personal fitness and improved overall self-care. She stated a very interesting strategy related to her weight loss goal: “No new clothes” until she reaches her target weight. (Far more constructive than “No new food.”)

Following these two planners’ accounts, I noted the importance of having an inspiring and meaningful vision behind specific goals and actions. I offered a personal example. I committed to two major goals for 2011: to attain my most robust level of health and wellness ever; and to finish the handbook of positive questions for advisors I’ve been working on. The inspiring image of “my most robust level of health and wellness ever” has been an unwavering standard: I exercise daily, I do yoga every morning (because I *want to*: that’s new), and I happily took a two-month course on mindfulness and health. For some folks (visual thinkers), mental imagery works best; for others, numbers and graphs do the job. For me, as a verbal sort, the words “most robust level of health and wellness” is like a clarion call. And the book is coming along, though not on quickly. I’m confident that I’ll finish it this year, because (1) I made a public commitment to it, in a

newsletter column I wrote for the Garrett Planning Network and in this Recap; (2) I *really* want to bring this book into being; and (3) people are asking me about it.

Some Final Thoughts: How are you doing on your 2011 goals? (a) Have you articulated 2011 goals? If not, keep in mind the words of the 19th century novelist George Sand: “It is never too late to be what you might have been.” If that seems extreme, surely you’d agree that “It’s never too late to plan.” Why not start now? (b) If you’re behind in implementing your action plans or if circumstances have shifted, when would be a good time to do a stop-action and self-review? Feel free to use the five italicized questions at the beginning of this Recap as a guide. And of course, (c) If you are on-track with your goal plan, congratulations! How (if at all) do you need to tweak the plans, based on what you’ve learned in the first quarter?

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