

**12-22-09 Open Mic Recap:
OM's 2009 Swan Song and a Look at OM for 2010**

Highlights: Eight of us gathered, from all over the US, for a very authentic, comfortable, and reflective conversation. I believe we all benefited and enjoyed the hour; my hope is that by reading the Recap, you'll sense the tone and content of 2009's wrap-up OM, and will gain some new ideas. And some reasons for joining us in 2010.

RE-CAP:

“Gratitude Jolt” I suggested two minutes of gratitude journaling. I called it a **“Gratitude Jolt,”** because when I had sat down to do my morning journaling several hours earlier, my mind was a total blank; I considered phoning AAA to have them jump start-start my brain. Figuring that would be overkill (perhaps literally), I decided instead to see if, by quickly writing down 10-15 things that I was grateful for in that moment, I could **jolt** my brain and mind into gear. *It worked!* So I introduced it to the OM choir, and we “jolted” ourselves. Afterwards, one person noted her surprise that the first item on her list was her mother, and her gratitude that her mom is surrounded by supportive others and “is not alone as a widow.” Now, she can enjoy her mother, without feeling obligated to be her primary caregiver; a great relief, and a pleasant surprise to discover that this circumstance was top-of-mind.

Anticipating the Impending Holidays: Folks shared how they were intending to use the next week or 10 days:

One planner is looking forward to being at work in perhaps the quietest period of the entire year: with few client calls. It's a great time for reflecting back, looking forward... “the Big Picture level, without being caught up in the moment-to-moment.” (Several others noted their use of the next week in a similar way, and I would add, me too.)

Another planner was looking forward to this upcoming period, in which she and her husband do their annual “marital strategic plan.” (If you've done a double-take, upon reading that phrase, read on; I was totally fascinated.) It's the 15th year of their doing this exercise. She told us “it's a time to celebrate accomplishments against plan, honor each other, review their financial picture, and preview the next year.” They revisit their vision and mission statement, and recommit to it (or, presumably, tinker with it). She has introduced it to clients as well. One important aspect: she and her husband take turns leading it, so that in alternating years, one is “off duty” while the other facilitates. A great annual ritual for staying in touch with oneself and one's partner/spouse!

A third OMer, a pastoral counselor, is looking forward to organizing her upcoming Anger Management groups for women, contacting prospects, and moving the process forward. She is eager for this start-up phase to be over, and to get the group moving. As a single person, the impending New Years has a slightly painful aspect but, she noted, not one that she needs to dwell on.

Others shared their intentions to do some reflecting, some organizing, some Family and Friend Time, and in general kicking back.

An Open Mic Retrospective: This session being the last Open Mic of its first year, I asked participants to reflect on what Open Mic has done for them. I noted that I wasn't seeking compliments or praise, but understanding and perhaps some help envisioning how Open Mic in 2010 can continue and enrich its contributions. What I heard was very informative, insightful, and moving...and gives me a lot of grist for 2010's OM.

- “An oasis,” said one participant. A time out for him to gain some self-nurturance. Most of his work time, he noted, is in giving others – clients, employees – a lot of nurturance. Open Mic, he said, is for *him*.
- FPA calls itself, in part, “the heart of financial planning,” said another. For him, Open Mic is “the heart of financial planners.” We have the technical resources and know where to find them; Open Mic, for him, is the heart of what it means to be a financial planner. One highlight, he noted, was the session in which someone recounted having been duped by a less than stellar planner, and how the individual kept his perspective and ultimately landed on his feet. He noted that he hadn't been in that OM hour, but had profited from reading the Recap of it. (How cool is that?)
- “It's a place to float a question, for which we may not have another audience...and to get feedback.”
- A fourth person seconded the “oasis” concept, adding that sometimes he attends and is quiet, and gains a lot from simply listening. He gleans ways to help his clients (he works with planners as a marketing coach), learns some neat exercises, gains an understanding of what's going on with planners, and he enjoys supporting my doing the Open Mic. (I was moved and grateful for his noting that.)

What Would Enhance Open Mic for You? We naturally segued into this question when one participant noted that it would be valuable for me to preview each session by noting a provocative topic or question to come. A great idea, and it led me to ask for topics that attendees would like to see in 2010. Here's what came forth:

1. How we can use these OM processes with our clients – how planners can create a space, an oasis for people to talk about what's going on in their lives and their world.
 - This person pointed out that planners often avoid using behavioral finance and life planning approaches because they lack comfort with and expertise in them. We could help them with information and suggestions for taking the first steps.
 - I noted that The Planning Center (www.theplanningcenter.com) in Moline, IL is pioneering the use of Circle methodology (www.artofhosting.com) with clients as well as with staff members, as a way of deepening conversations and connections.

I offered to invite one or more of TPC's people to talk with us on an OM session in 2010, and folks thought that would be great. Stay tuned.

2. A second person suggested the topic of "How we set our intentions with clients, and how they set theirs with us."
3. Another suggested that attendees could share stories or client cases in which they experienced dilemmas. They could receive support, advice, commiseration and the like.

These are all fascinating directions for OM in 2010. I am going to send out a very brief questionnaire – 3 or 4 questions-- in early January, to tap into your ideas as to topics, presenters, and any changes in format for Open Mic. Stay tuned.

However, if you simply cannot wait until January to influence Open Mic in 2010, please email me your suggestions now for:

- a. How to strengthen Open Mic's processes: what you like best so far, what to emphasize, ideas for new stuff.
- b. Topics (they wouldn't necessarily take the whole hour)
- c. Presenters (ditto)

Some Final 2009 OM Thoughts:

Open Mic has been a real high point of 2009 for me. While it takes "work" to keep it going, write Recaps, etc., it's a work of the heart and spirit. It has given me (a) an opportunity to contribute to you and through you, to your clients, colleagues and families, (b) a place to use (and deepen and expand) my gifts and talents, (c) a community of folks who gather to... well, to *commune*, (d) an opportunity to learn about you, your clients, the working of community, and myself, (e) new friends and fellow path-makers, and (f) a plan for a new offering in 2010, called ***Open Mic, Open Minds™ (OM2)***. Stay tuned for details of this paid-by-subscription offering (Open Mic for finance professionals will remain free). It's for financial planners' clients and it will... well, stay tuned for details in the next couple of months.

The net-net is this: I am immensely grateful for your support of Open Mic, for your friendship, for your feedback about the conversations and the Recaps, and for caring so much about your work and your clients, for whom you do so much.

Have a wonderful holiday and an abundant and flourishing New Year. See you on January 13, 2010 for the new year's inaugural Open Mic!