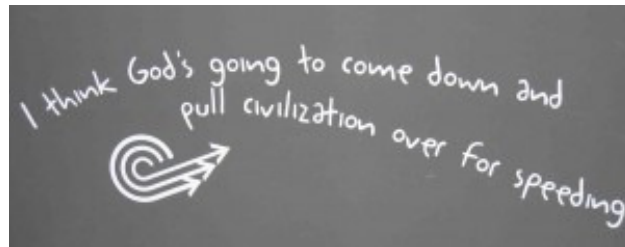


## April 7, 2010 Open Mic Recap

**Highlights:** A bunch of us gathered around the virtual campfire today. Instead of telling scary ghost stories, I facilitated campers' self-review of their first-quarter 2010 goals, related the goals to their long-range aspirations, and suggested a way to create an inspired second quarter. Read on, for (a) the process that you can use to conduct your own self-review (or facilitate others' reviews) and (b) what participants shared about their own reviews.

**A Centering Moment:** I led a one-minute centering meditation, to help us "arrive" where we were gathered, shake off the road noise, and maximize the hour's benefits. I had just read a fine article on Positive Psychology News titled "Little Drops of Quiet" (<http://positivepsychologynews.com/news/amanda-horne/2010040610341>), which contained a graphic with this provocative message:



My hope is that doing the centering moment would get us off with a warning. (Subscribe to PPND for free at [www.positivepsychologynews.com](http://www.positivepsychologynews.com).)

**"What Brings You Here Today?"** I asked callers to share why they phoned in today. Half cited the Self-Review, several noting that their first-quarter results were not what they wished. Others said they've missed a few Open Mics, and wanted to get back in the OM groove. For one East Coast participant, calling in on her Noon lunch time was part of her "Diet Plan," as she would consume fewer calories by paying attention. (Never let it be said that Open Mic is empty calories.)

### Your First-Quarter 2010 Self-Review

The English writer George Eliot said, "It's never too late to be who you might have been." We can apply the same sentiment to our goals and plans, review them, and build on what we have found.

Here are the steps I used in guiding the Self-Review. You might want to use it as a template for your own review, and share it others.

## **What's the Best Thing About Your 2010 Thus Far?**

It could be:

- A surprise or delight
- Something that's been hopeful or encouraging
- Or something else

What about it led you to choose it as the "Best Thing"?

## **Think About (and Write Down, if possible) Your 2010 Goals and Aspirations (Personal and Work)**

(Whether they're formal and documented, or informal and kept in your head, or otherwise.)

### **Select One Goal:**

How far along are you, on this goal? (Percent complete or percent attained, as in a revenue goal; or if not quantifiable, steps you have taken or milestones achieved.)

What stands out as a high point in this area for you, this quarter? Or a small success? Or an encouraging sign, something to build on?

What's been one positive surprise, in this goal area?

What's been a "rude surprise?"

What have you learned, in the first quarter 2010 about this goal area that will help you in the second quarter?

### **Select a Second Goal:**

How far along are you, on this goal? (Percent complete or percent attained, as in a revenue goal; or if not quantifiable, steps you have taken or milestones achieved.)

What stands out as a high point in this area for you, this quarter? Or a small success? Or an encouraging sign: something to build on?

What's been one positive surprise in this goal area?

What's been a "rude surprise?"

What have you learned in the first quarter 2010, about this goal area, that will help you in the second quarter?

### **Vision:**

As you peruse your list of 2010 goals, how aligned are they to your long-term aspiration for yourself (or your firm, your family, etc.)?

If there is a gap, what can you do to bring your goals and aspirations into closer alignment?

Joseph Campbell said that *“The trouble with climbing the ladder of success is that sometimes, you get to the top, and find that the ladder is against the wrong wall.”*

Is your ladder leaning against the right wall?

If not, what can you do about it?

### **What We Discussed**

Here’s a sample of what attendees shared about ***The Best Thing about 2010 Thus Far:***

“My practice is burgeoning; I’m turning away people, and referring them to other advisors with whom I share values in common.”

“I have five new clients this quarter.”

“I’ve begun weight training – and I like it!”

“I did my first World Café with clients. It went well enough that I have several more planned.” (See [www.worldcafe.com](http://www.worldcafe.com).)

“I’ve been having cancer chemo. We joined Anytime Fitness and are using it well, to counter the effects of the chemo on me.”

“I’ve been honoring my commitment to spend two hours a day outside; one hour walking, and one hour golfing or drinking wine.” (Two points here: First, she obviously doesn’t live in the Midwest. Second, yes, she acknowledged that she sometimes combines the wine and the golf. Go figure.)

Two people volunteered to share what they had written about one of their goals:

#### ***Participant 1:***

Her goal entails contacting 2-3 prospects per week, gleaned from a variety of sources. She has a call plan, and a process for guiding the prospect in a call-to-action (if possible and appropriate). She is getting appointments regularly, and is consistently meeting her calling goal. A frequent High Point is the energy that the calls bring her, as she enjoys the people she’s been talking with. A ‘rude surprise’ is that many high-wealth prospects are not turning out to be good matches for her ideal client profile.

## **Participant 2:**

This planner's aspiration includes living full-time in the Southwest (Yes, he is a Midwesterner) and dividing his time between his planning business and an institute for social entrepreneurship. The first quarter goal involves preparing for a change of residence and a creating a client handoff plan by summer 2011. Thus far, the client transition process he has created with his firm has gone smoothly, and ten percent of clients are now transferred. All vectors are pointing in the right direction. His positive surprise: his AZ condo sold quickly, and he and his wife purchased a home there. The rude surprise involved a hiccup in the house sale negotiation, which was dealt with forthrightly and successfully.

## **Final Exercise in the Self-Review**

Following these two participants' sharing, I led callers in this exercise:

*"Imagine it's the first week in July, 2010, and I am conducting a second quarter self-review on Open Mic. It's been a fabulous quarter for you; everything is going well, perhaps better than you dared hope or plan for. What will you be telling us about what happened during this quarter? What did you do to bring about these positive developments? Who else helped?"*

We had time for one person to describe her "Second Quarter 2010 Report." It involves a total revamp of her website, and in July, she will report that "It's 75 percent complete, with lots of new, fun stuff." Her report also involves her care-giving role at home; she will report that she has discovered and secured new resources, to lighten her load. And she has learned, in this second quarter, to stay focused and "keep my appointments with myself."

If you would like to read more about conducting a Self-Review, go to <http://www.edwardjacobson.com/files/Time%20for%20Your%20First%20Quarter%20Self%20Review.pdf> for my recent blog on the FPA Future of Planning website. For the F.O.P. site, go to [www.fpanet.org](http://www.fpanet.org), go to the Career and Practice pull-down menu, and select the bottom line, "Future of Planning."

**Next Open Mic: Wednesday, April 28 at 5:00 pm Eastern Time U.S.** We'll talk about highlights of FPA Retreat (April 22-25), and there will be some surprises. Join us!