

LIFE LEADERSHIP

Bud Lamb

Teach us to number our days, that we may gain a heart of wisdom.

Psalm 90:12

Many leaders substitute goal setting for life planning, but I think it's a bad trade-off in my experience. In my experience, goal setting can leave you empty. Most of us set goals, but very few of us have enjoyed real long-term success.

Daniel Harkavy

Win at Work and Win at Life!

Do you win at work and at the rest of your life? How would your wife answer that? Your kids? How about your Mom and Dad that live eight hours away? Or your best friend?

How about the other parts of your life besides family, health, finances, your spirituality - are you winning there?

For most of us, we manage to win at work but struggle to find a way to win the other parts of our lives.

For years I fought to bring balance by getting a better handle on my time.

When I was younger I moved through what Steven Covey calls “three generations” of time management. The first is based on reminders, simple notes, and checklists. Second generation is about calendars, appointments, and getting things done. Third generation is planning, prioritizing, and controlling.

These can leave us exhausted, frozen with indecision, jumping from one fire to another, or wanting something more.

There is a better way. Covey says we need to move beyond time management to life leadership – to a fourth generation based on paradigms that will create quality-of-life results.ⁱ

You can win at work AND win at life! A simple tool called a “Life Plan”ⁱⁱ can help you clarify what a “win” looks like at work and the other areas of your life. It can also provide structure to follow through. I know. I’m living it.

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What Is A Life Plan?ⁱⁱⁱ

In essence, life planning is nothing but a process of accumulating net worth in the most important accounts in your life. This process gives you great clarity on what you must do to accumulate net worth in each of those accounts. Again, this is “net worth” not only in your financial accounts or your career account, but in your relationship accounts and health accounts and recreational accounts and spiritual accounts and whatever other accounts you consider most crucial.

By going through this process, you will gain clarity on where you want to be in each of those accounts and then identify what you need to do daily in order to accumulate more net worth in each of them. And, in that way, you remain on purpose and avoid a reactive life that leads to terrible regrets. Your actions become very congruent with the person you want to become.

Life planning is all about assessing where you are in life, identifying which accounts are most important to you, and then writing out a vision for each one of those accounts. An effective Life Plan clarifies your purpose in each of those accounts and then identifies three to five strategies that will enable you to increase your net worth in each area.

The Process

The Process is pretty simple. Get away from life as you know it for a day. Identify major areas of your life, not just your business. Next describe in a few sentences how you would like each major area to look like in the future.

It will take a whole day to crack this open for you. Don't fool yourself into thinking you can get it done any other way. If you could you wouldn't be in the situation you are in right now. Don't bring your laptop, your cell phone, or your iPad. Go old school and bring a pen and a yellow tablet.

1. Get away. This is non-negotiable. Get away from everything. Go somewhere awesome that you consider a treat. It might be to the river, to the park, to the beach, or somewhere up in the mountains. Choose a place where the setting puts you in a creative, reflective mood. It is a day to focus exclusively on how you want to live life. It's not a day to spend at the library, your office, or your cave in the garage.

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I rented a room at the Lake Natoma Inn with an early check-in. Eight hours later I had completed the draft of my Life Plan. My wife arrived, we went to dinner, spent the night. In the morning we took a walk around Lake Natoma, had great breakfast at Karen's Bakery just around the corner, and killed two birds with one stone – and the hotel room and meal was tax deductible.

2. Identify accounts. Begin by thinking deeply about the main areas/accounts of your life. Take your time, this is a foundational step. The big idea is to identify those big areas that are most important to you. Give each one a name that means something to you.

You can check out my Life Plan at the end of this. Chances are some of my areas will be yours – make it yours.

3. Desired results. For each account/area think what real success in this area would look like in 30 years. Linger with this. Scribble, make notes. Toss pages that are rabbit trails. Include God in this, as in “Will You help me figure this out?”

This is hard work but stick with it. I got high-centered when I let “How am I going to do this!?” into my envisioning. Don't go into “How.” Stay with “What” i.e. “what do I want this area to look like?” Stick with it. The desired result will be your God inspired Polaris.

Here's what Harkarvy says about this.

As you complete your own Life Plan, wrestle through each of your accounts. Ponder your vision for each one, and note three to five key activities that will enable you to accumulate net worth in that account. That document will clarify your vision, your purpose, and the specific activities that will enable you to accumulate net worth in each account. You've labored through it, and now you have a living document, something that you will use to guide your daily decisions and actions. And most important, it will help you to stay on purpose.

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Down the Mountain

Once I created my Life Plan I went back down the mountain. I didn't attempt to really make any changes initially. A few things helped me along the way.

1. Review it daily. Each day for 90 days I reviewed reading every line in the morning over coffee and talked about it with God. It became a living document inside of me.

The activities came to become borders and boundaries on my day. Decisions, choices, and challenges began to run through a character filter in my soul.

2. Check-in. Harkavy recommends that we invite a friend into the mix. I asked my brother in law, Don Carroll. Don was an easy one as we have talked business and ministry for years. I trust him/he me. We have good BS meters and can call each other on our stuff.

We used these questions in a 30 minute phone call each week. We divided our time in two 15 minute sections. I would ask and answer these questions and then Don would do the same. At the end we would pray for each other, talk about a trail run or mountain bike ride and then sign off and get off to work. Don and I have been using these weekly check in questions for the past eight years.

- What are my dreams and goals?
- What did I do yesterday to take me closer to my dreams and goals?
- What will I do today to take me closer to my dreams and goals?
- What might be difficult about today?
- What am I grateful for?

3. Align it. Begin to add elements of your Life Plan into your schedule. Here is where this gets exciting. The key to align it is to block dedicated time to get things done. Dedicated time; i.e. time to plan your day/week and time to execute in blocks of time sufficient to get it done. The operative phrase is "More is less and less is more."

Align your calendar with your priorities before other people or circumstances find their way into your calendar.

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4. 6:6.^{iv} I use a tool championed by Bill Hybels and Gene Appel, the tool is called the “Six-By-Six” and it works like this.

Identify six priorities that you want to accomplish in the next six weeks. This involves asking where you can make the greatest contribution to the accounts in your life in the next six weeks. What decisions and initiatives do you need to focus on? Which staff issues do you have to address? Which projects or plans do you have to hit out of the park? Etc.

There is nothing sacred about the six weeks (or the six things), but that amount of time seems to keep your urgency level high. You can't sprint for six months, but six weeks? That you can do.

Get others involved as well. Have them email their priorities one six-week chunk at a time. This tool is a great informative, instructive, and corrective means of fostering a genuine sense of team among their senior leaders.

5. Adjust it. Many people get overzealous in creating their Life Plan. They come up with eighteen accounts and ten strategies to accumulate net worth in each account. But in a month or so, they begin to realize that no superman or wonderwoman could keep up with such a plan.

So don't be afraid to adjust where necessary.

Remember, this is a living document, so be prepared to write on it and mark it up.

Do a weekly review, then a more formal review of your Life Plan every quarter. Then finish each year by doing a complete Life Plan overhaul every December. Evaluate how you did over the past year, and then adjust it for the year ahead. This allows you to alter your plan as the seasons in your life change.

You may also have to adjust your Life Plan around new priorities that surface in your career. Adjust your Life Plan to reflect your new reality without giving up what you consider most important.

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Sample Life Plan

Where I want to be in the year 2038 – How I will get there

Relationship with God

I am aware of You all the time, like just now. I am aware and reliant on Your Presence to enjoy the moment and to love others. I know and enjoy You, Your heart, Your story – and have learned to live in Your house.

2014 Actions:

1. Take a spiritual retreat day once each quarter.
2. Be intentional with my morning time; SOAP and pray.
3. Memorize with Scripture Typer.

Relationship with my wife

Lea Ann is my most intimate and trusted lover, partner and friend. We pray and play together – I am her most faithful cheerleader, she thrives as a woman through my husbandship and love.

2014 Actions:

1. Read and pray Friday mornings
2. Get aways [4]. March 20-22 Calistoga
3. Take a class, go to a play, go out with other couples, bj's for paloozies.

Relationships with Family and Friends

I have inspired you to know and enjoy God and to succeed in life. I keep in touch by taking the initiative. I do my best to be real, to keep short accounts, to be genuinely interested in your life.

2014 Actions:

1. Family get away with the kids.
2. Support Don and Joyce through Don's cancer.
3. Remember birthdays of Travis, Heather, Nate, Carrie, Rachel, Danny, Mandi, Bryce, Frank, Emily, Ryan, Shane, Scotty, Quintonn, Susan, Betsey, Scott, Don, Joyce, Mike, Robin, Judy, Vern

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4. Pursue friendships with a few new couples.

Finances

I live within my means, am prepared for the future and am generous to others.

2014 Actions:

1. Reduce monthly expenses to X.
2. Increase investing to X per month
3. We have a financial plan and monitor it quarterly
4. Review our Trust and Will by April.

Career

I am a great steward of my life, my time, and my talents in order to expand Jesus' influence.

2014 Actions:

1. Lead 360 degrees. 2014 is the **Year of The Playbook, ShovelWork, and The Havarky Advantage**
2. Lead group leaders to ROLL into increased Bible literacy and spiritual depth.
3. Lead the way with intentional leadership development via *Barnabas* and other resources.
4. **Re-engineer Group Life**; draft and implement the Group Life Playbook using resources such as 7 Sins, Gladden, Sticky Church, Simple Groups.

Health

Care for my soul has been a priority for me. This means I carve out lots of margin so I can actually do the stuff that feeds my soul. Spiritually and physically I have stamina, am fit, trim and limber and maintain a sustainable pace and rhythm to my life. I monitor my soul via HALT/STAR.

2014 Actions:

1. Run 1,000 miles.
2. Weigh 180 lbs.
3. Eat great food.
4. Read 3 new inspiring books.

Rest-Recreation-Margin

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I do things that expand my heart, visit the places of my dreams and honor the creative side of my life.

2014 Actions:

1. Kayak, hike, or trail run for 90 minutes each week.
2. Schedule all vacation and study leave to be completed by August 1.
3. **Think deeply (black bucket) in the presence of God.**
4. Renovate kayak, chairs.

ⁱ First Things First, Stephen R. Covey

ⁱⁱ Life Plan is a process I learned from Daniel Harkavy in his book *Becoming a Coaching Leader*.

ⁱⁱⁱ *ibid*

^{iv} Axiom, Bill Hybels