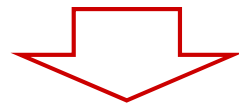

Life Planning Exercises



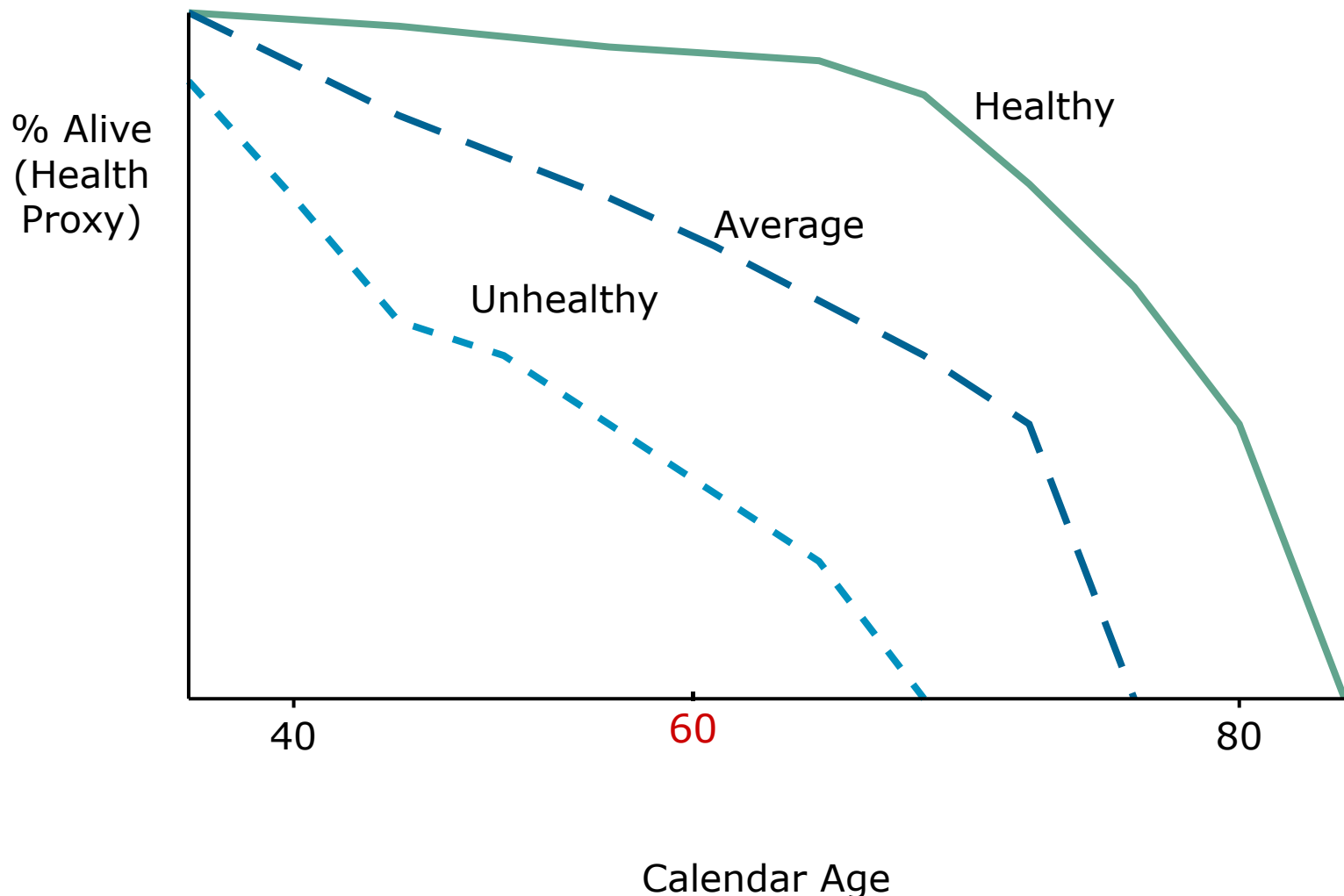
Life Planning: How much time do you have?

- You probably have more time than you think ... Your Life Expectancy =
 - Average age of your 4 grandparents
 - Plus 10 years _____
- You also are likely to have better health, energy and capacity for productive activity
 - "From 55-75 you'll have the health and energy they had 50-65"*



- **And ...you can improve your odds and your "real age"**

Aging curves



Source: Adapted from Real Age, Michael F. Roizen, M.D., page 14

Harry's life planning

- First life plan – 1970
 - A “strategy” – three careers
 - Visualization w/ objectives
 - Discussed with friends
- Annual review
 - Tailored excercises
 - 10 year vision
 - Year's objectives and plan
- Daily focusing (QT)



Valuable exercises

- **Diagnostic**

- Motivated skills
- Situation assessment
- Jungian integration

- **Objectives**

- Obituary
- Dreams and desires
- Mission (Covey)

- **The Road (Plan)**

- Organizational strategy
- Cronogram
- Life plan



Exercise: obituary

- You are attending your own funeral. There are three speakers ...
 - Your son or daughter
 - A business colleague
 - A good friend in the community
- Write out the three speeches it would give you great satisfaction to hear. (Remember good speeches have very specific anecdotes not vague generalities)



Exercise: dreams and desires

20



Work

Family

Community

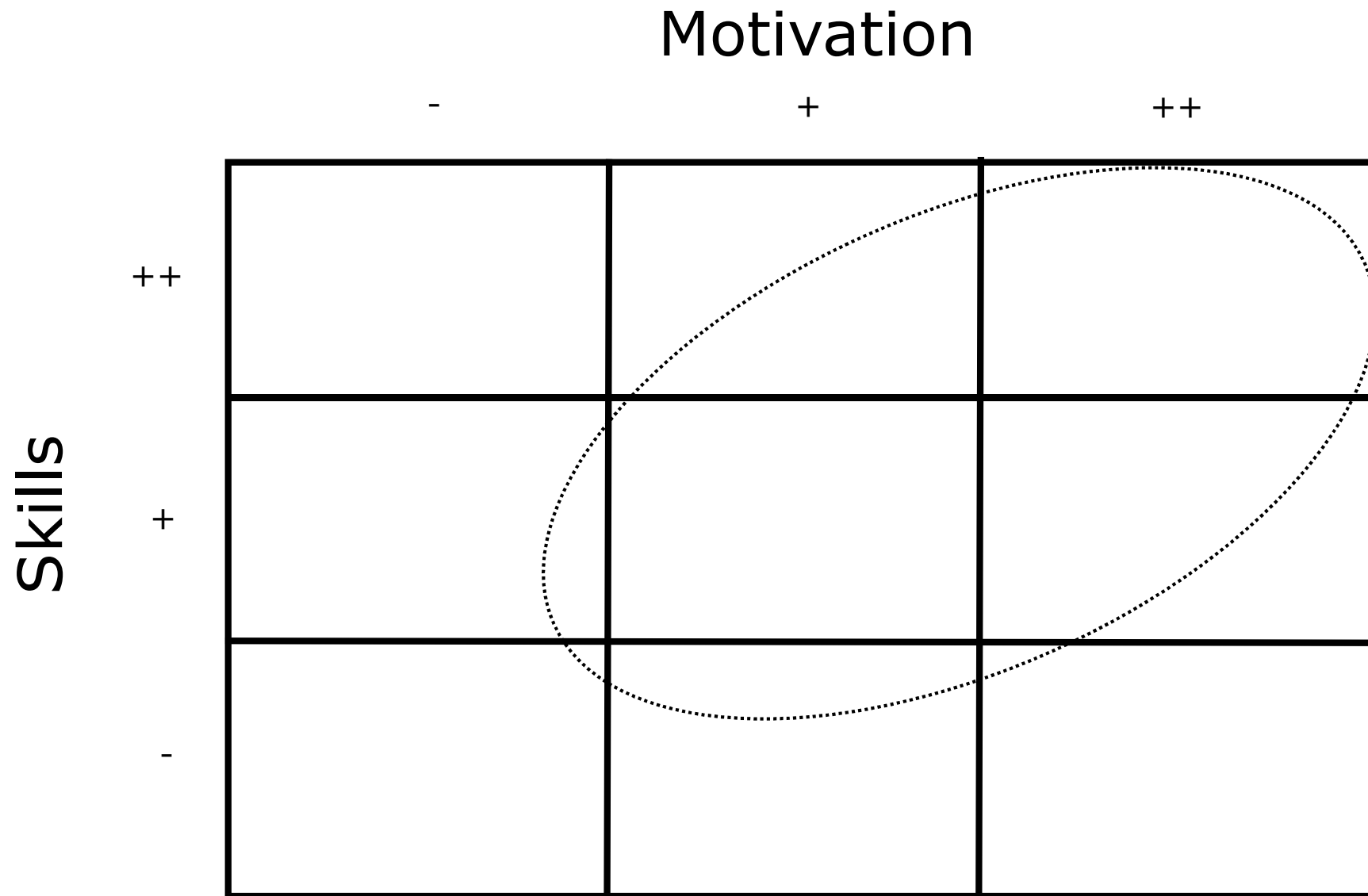
Net Worth

Etc.

Aspirations/experiences, etc.

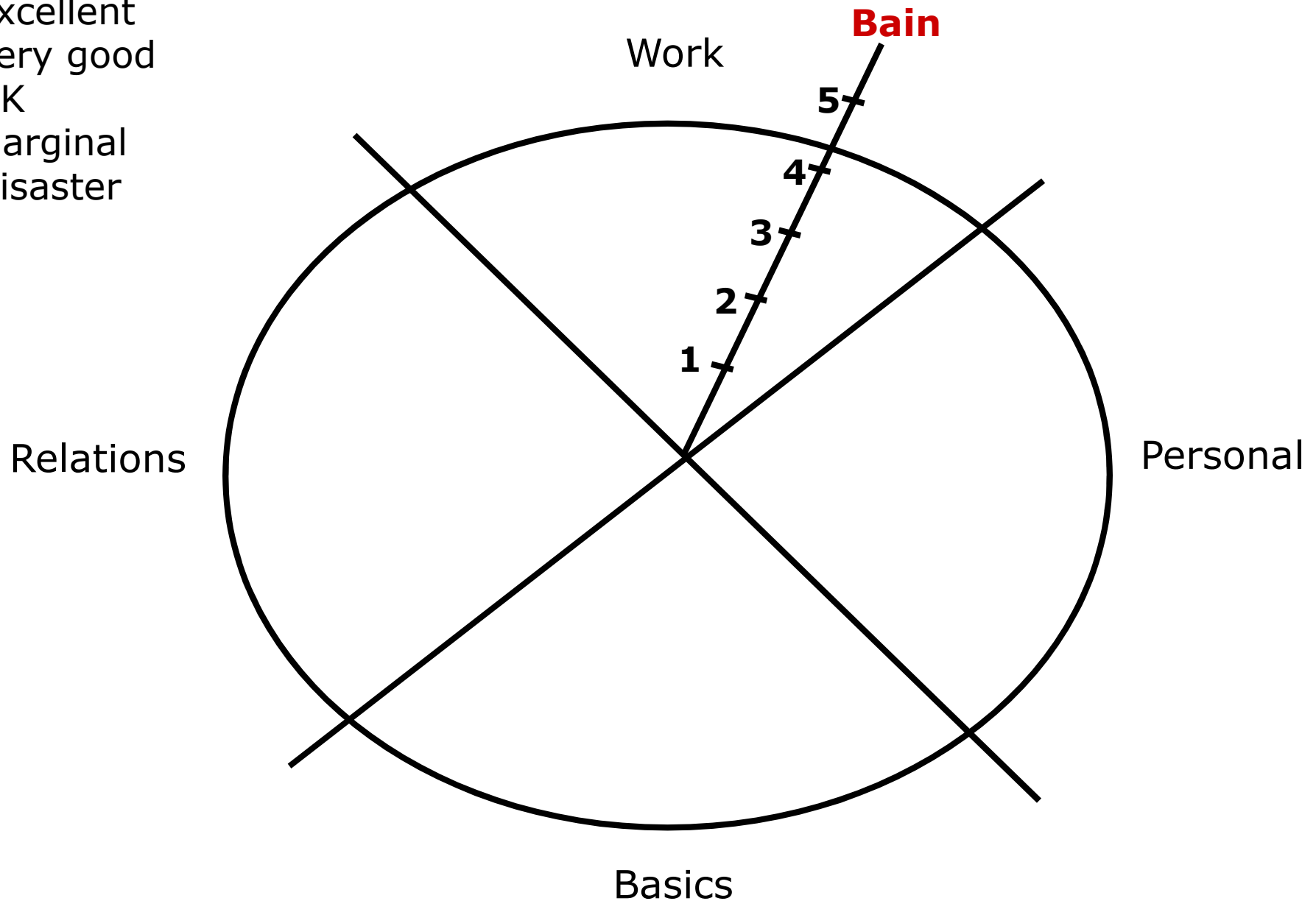


Exercise: motivated skills matrix



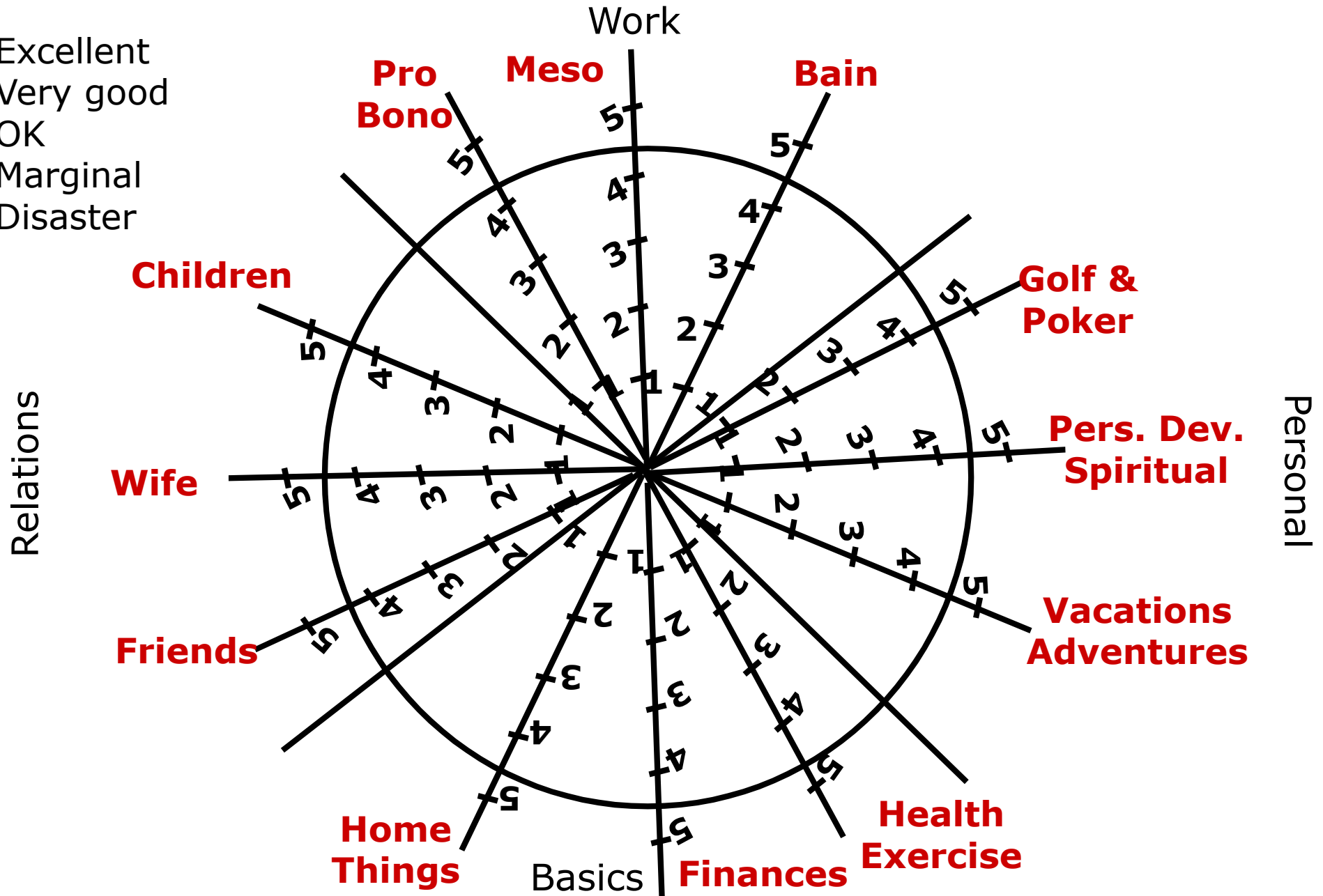
Exercise: strategy/situation assessment

5=Excellent
4=Very good
3=OK
2=Marginal
1=Disaster



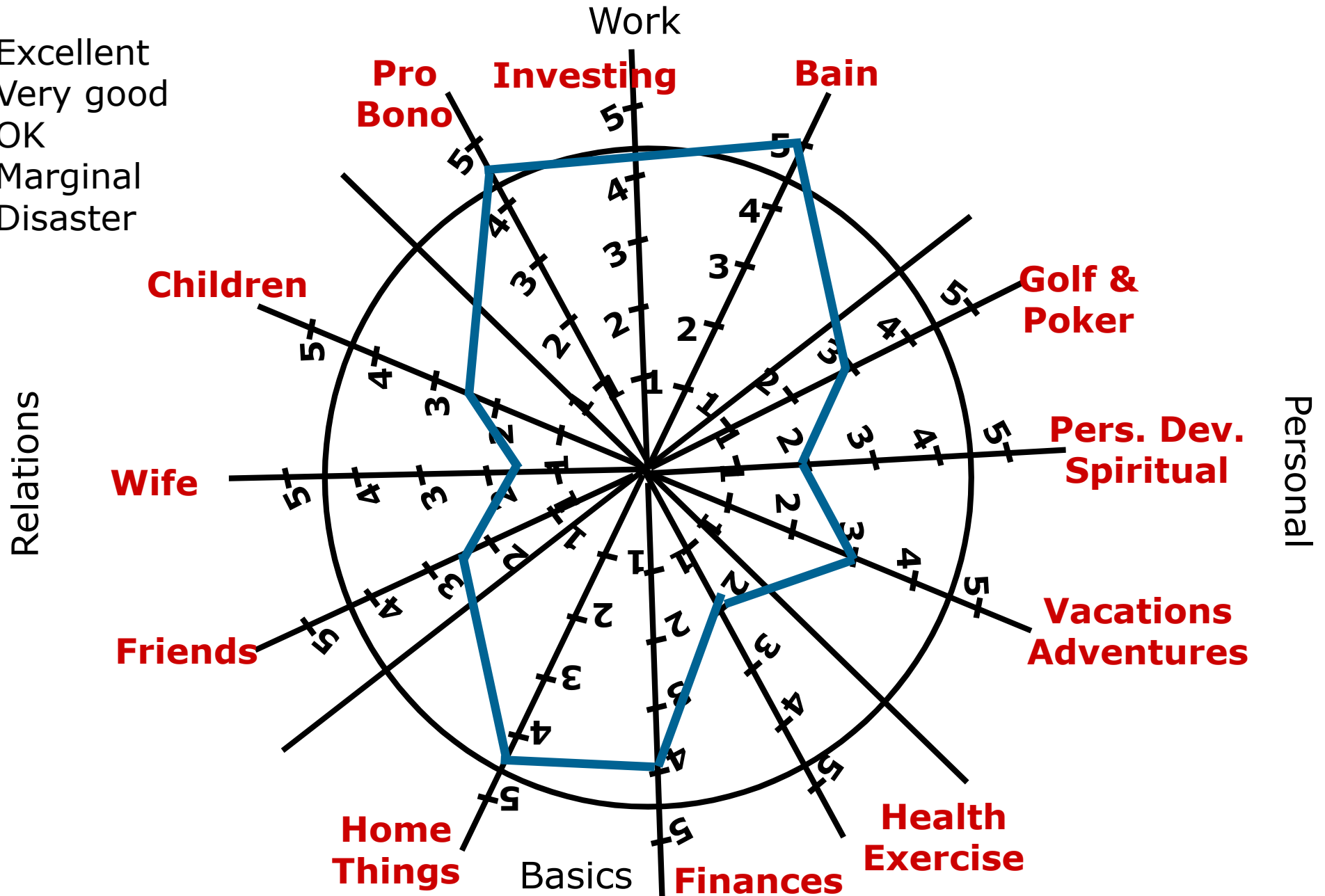
Exercise: situation

5=Excellent
 4=Very good
 3=OK
 2=Marginal
 1=Disaster



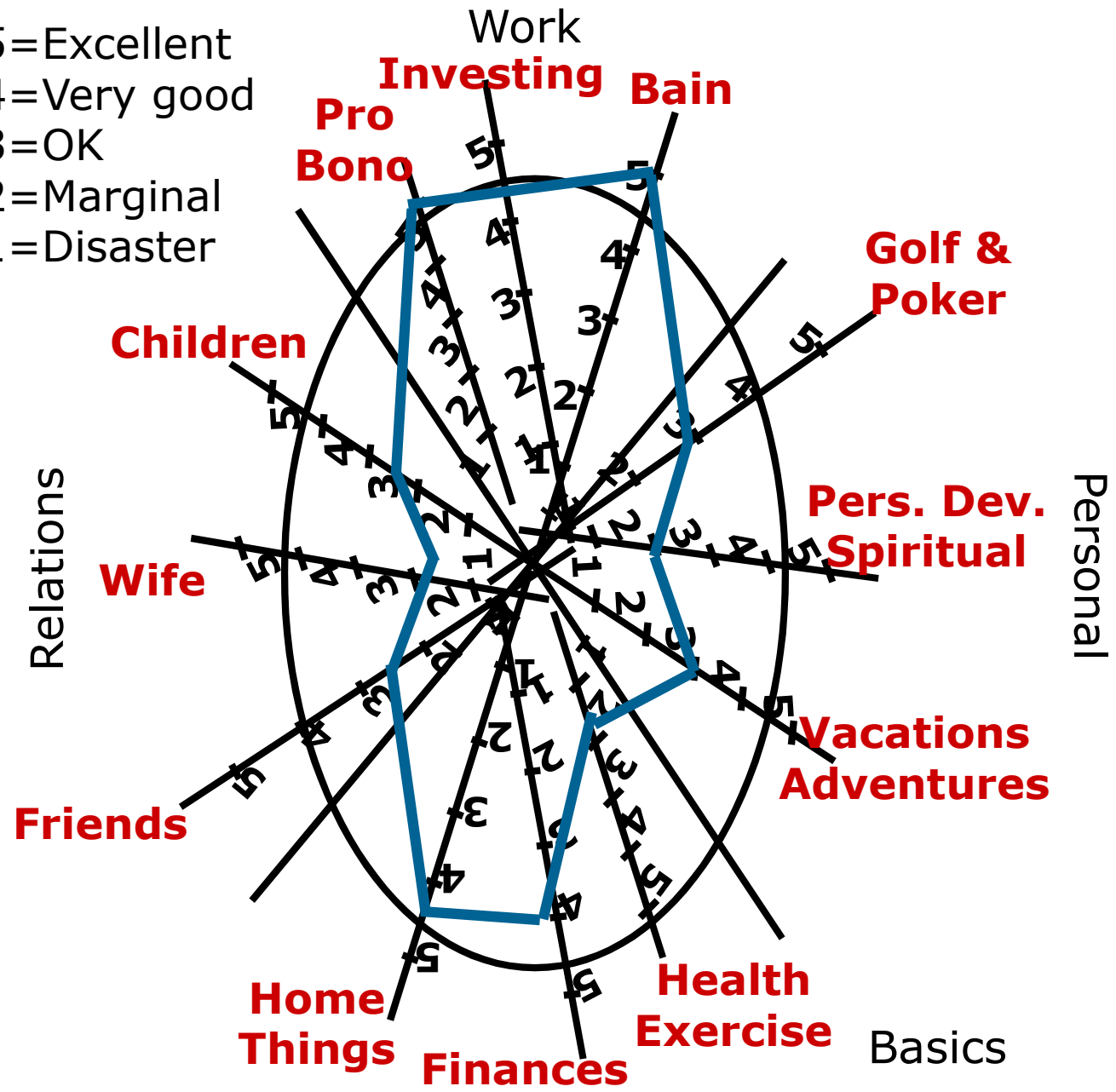
Exercise: situation in 1985

5=Excellent
 4=Very good
 3=OK
 2=Marginal
 1=Disaster



Exercise: situation in 1985

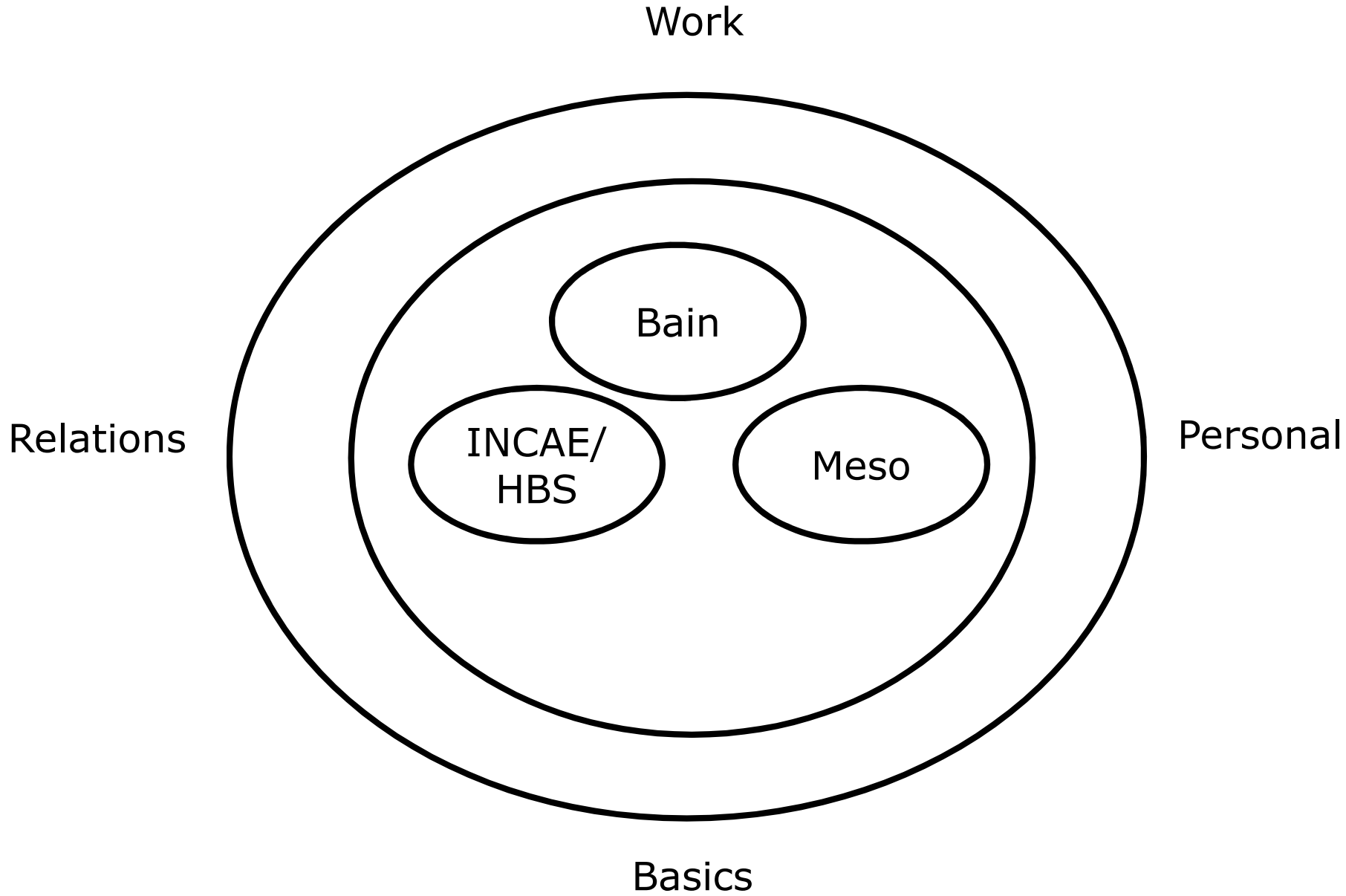
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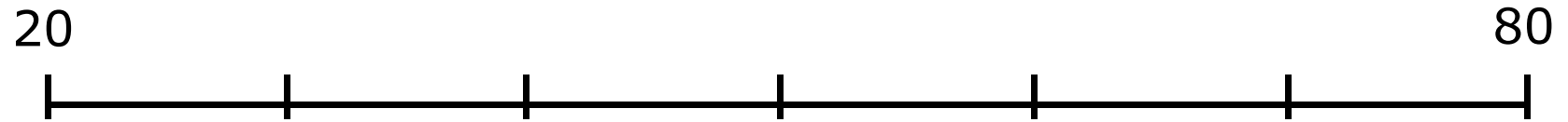
Process

- Areas to evaluate?
- Grade?
- Why?
- Implicit strategy?
- What changes?
- Obstacles?
- Collateral impact?

Exercise: organizational strategy



Exercise: cronogram HWS



Misión/Role

Solutions Value creation C.A. competitiveness

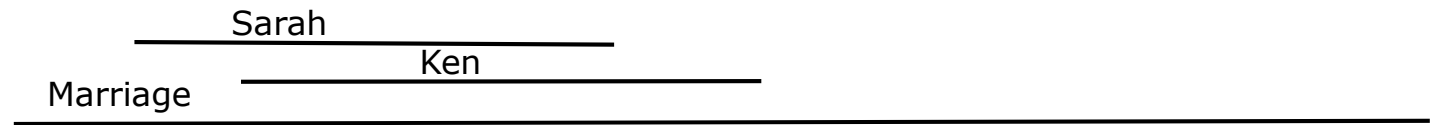
Focus

Preparation Academic Business Public service Retirement

Organiz.



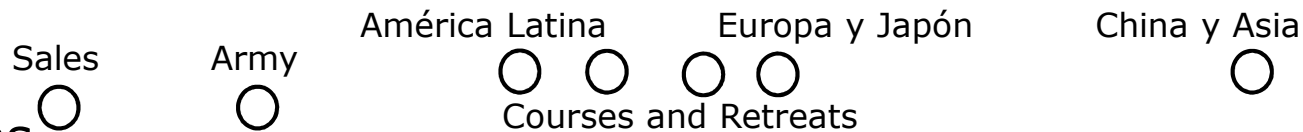
Family



Geography



Vacations Experiences



Exercise: Jungian integration

- The danger: a plan that is not really you!
- There are many “yous” – you need to know them, actualize them, honor them
- The great task of maturity is integrating these parts of you (persona, shadow, anima, etc). It’s critical to energy and health
- The “mass” people experience in you, the vitality and authenticity they admire, comes from this integration
- Does your life plan accomodate the multiple “yous”?

Some good planning quotes

“You tend to become what you do ... Choose your roles carefully.”

“Be careful what you ask for, for you shall surely get it.”

“If you can see something clearly, and truly want it ... all the powers of the universe mobilize themselves to help you get it.”

Harry's Work Lessons

Harry's lesson #1: there is no perfect job

"For the first 10 years of my career, I spent a lot of energy and time trying to find the perfect job ...

I finally realized - it doesn't exist.

What worked for me was to identify all the things I wanted to do, visualize them in sequence over time, and then find the best organizational platform from which to do them.

To my surprise ... Bain & Co. turned out to be the best platform for me for over 20 years."

Harry's lesson #2: you work for yourself

- At the end of the day, you work for yourself! You have to be your own boss. Take charge of your life. (Remember organizations are inherently blind and selfish...)
- But... get great satisfaction from making sure that you are a real bargain to your organizations! Make sure they are getting more than they are giving you

Harry's lesson #3: everyone (including you) needs a boss

- Role of a boss
 - Help you focus: objectives, priorities
 - Help you get the resources you need
 - Help you gather and interpret feedback
 - Make sure you're treated right!

- Find/develop good ones!!!

Harry's lesson #4: invest in relations

- School did not teach me how to work in a team
- “Networking” in order to sell consulting has always felt artificial and phony
- When I got to know my clients, colleagues and subordinates as people (their backgrounds, dreams, etc.) I found myself authentically caring for them, fascinated by them. They became among my best and most satisfying friends
- I've also found ... that “unbilled” favors often pay higher dividends than carefully negotiated reciprocities

Harry's lesson #5: we all need re-potting

"Every plant and every person needs to be re-potted every 10 years."