

## Personal Plan Accounts Workshop

Welcome back to another session of Guidestone University.

So, here's what I want to do. I want to back up just a little bit. The last couple of sessions we worked on thinking through, how we want people to remember us at the end of our life, or as we get into the later years of our career. And so, we thought through who would be at our funeral, and what we would want them to say. So, I want to back up and share with you some of my insights. I hesitate to do this, because the point of this is not to give it to you, so you can copy my personal plan account, so you can copy my information down and use it for yourself. But I want to give you some context and to see how you do it. And so, as you begin here, you have enough context to make some real progress here pretty quickly.

So, if you haven't really done that, first of all, you need to go back to who's at your funeral and write what they're going to say at your funeral, how do you want to be remembered by them. If you don't do that before you hear and see my list, then it's going to be more challenging for you as you work through your list and you work through how you want to be remembered by them. So, do it first. Pause it now if you have to or go back and watch that session – finish that session then come back to this one.

Okay, so let's look at my list real quick. Now, remember, a personal plan is all about who and what is most important to me. Because once we understand that, and once we've written it down, we see it in front of us, then we can figure out how we can invest the time and energy into those most important relationships, into those most important things that we want to spend our life doing.

Here's the principle. When you know what you want the future to look like, then you can work everyday toward that envisioned future. And so, our personal plan accounts, this big areas of our life and of our work represent those people and those things that are most important to us.

And so, here's my list. Now, this may not be your style, but at the very top of my list is God. Faith is just a big part of my life; again, that may not be your style, but God is a big deal to me. And, so, the first thing that I wrote down was God. You'll say, "Wait a minute. Is God going to be in your funeral? Is he going to sit there in the chair or whatever?" And I say, "No. But as I worked through this I wanted to have thought through what I want my relationship with God to look like. And so, I thought through that relationship just as if He were a key relationship in my life and work.

You may or may not want to do that, but that's a foundational thing for me – a big thing to me. So, God is number one – and again, these are in order of priority, God would be first priority.

Number two, second priority. This is where people ask questions, okay? So, for me number two is Self. Now you'll say, "Wait a minute. Shouldn't others be before you?" Here's the principle. You have to first be able to lead yourself before you can lead other people. And you cannot lead other people in a healthy way if you are unhealthy. And so, self is number two for me because I can't have the right relationship with my wife, I can't have the right relationship with my kids if I am not first a healthy person. And so, self is number two. You see that?

In order to have healthy relationships with other people, I have to be healthy. If I'm not getting enough rest, if I'm not eating healthy, it affects my ability to have quality relationships and to achieve the outcomes that I want – to have richful deep relationships that I want with those people who are most important in my life and in my work.

The third priority in my list of priorities in my life is my wife, Sarah. Since we only have two children, I've listed my children separately – Madison and Andrew. Now if you have more than two children, you probably would end up with more personal plan accounts than you can manage appropriately. So, what I recommend as we work through this with hundreds of leaders is that they either group all the children together, or if there's one or two relationships that you're working on at the time you can kind of pair out or call out that one relationship. And as we work through this, you'll see what we mean by that. You can have specific members for that one relationship, and as you make progress in those areas then you can fold it back in to your children.

If your children are older, adult children, then it's not as important to have them listed out separately. But if your children are younger, and you're spending an enormous amount of time with them, you may want to have them separated out especially if you have one or two children.

So, we have God, self, my spouse, my children and the next area is friends. Now for me, this is a big area. It's an area that I have to be intentional with. I think most of us could have this area. Again, notice that I didn't write each one of them individually. I've got about six to ten friends that I interact with. I will call them regularly, I will text them regularly when I'm in the area in their city, I will make a point to spend time with them, I regularly send them books and resources and things that are helping me that I'm learning from. And so, friends has a big part in my life.

Again, it's also an area that I have to be intentional because it's not natural for me to develop relationships like that with people. I'm a task-oriented, busy person and so I have to make that a priority. That's why friends is a key area for me.

And this is important for us to all understand. There was a survey done recently in one market segment that asked leaders how many close friends that they had. How many close friends, how many people that could speak significantly into their life and in their work. How many close friends they had? And the results to me were astounding. Seventy-two percent said, they had zero close friends. I mean, not only have one or two or you can count them all in one hand, they said, we have zero. Seventy-two percent of them said, "I have zero close friends." That means nobody is speaking into their life and their work. Nobody is helping them with that social-emotional relationship. Nobody is creating contacts for them for deep relationships that help them in other areas of their life.

So this area has become critical for me to make sure that I'm regularly interacting with people who are speaking into my life, or asking me how things are going, who are checking in on initiative just to make sure that I haven't dropped the ball, who are asking me the tough questions. In fact, some of these people in my life asked me the most challenging questions of anyone else in my life, in my work, on my team, in my leadership and in my organization. Some of these people asked me some of the toughest questions than anybody else in the world – that's important to me.

Then the next two areas, again, fairly self-explanatory, yours may be similar – it may not be. Colleagues or the people that I work together with is the next key area. That's a big deal for me. It not only includes my team members, but it also includes key clients and it may for you also.

And the last area is, finances. Now again, you'll say, "Wait a minute. Finances, just like this God thing. God is not in your funeral. Finances are not in your funeral What I decided was, finances for me has such a critical part of my life and my work, I want to be intentional in this area. So I brought it in and added it to my personal plan.

I have what I want my finances, the way I wrote this out and you can do the same if this is a big deal to you, is how I want to be remembered financially. What do I want my finances to do for us – us individual, as families? How we want to spend and save, how we want to use finances to be generous for other people, and so I've made that part of my personal plan and you may want to do that too.

Again, the point is not for you to copy what I've done. The point is to give you a little bit of context and to help you as you go forward to make as much progress as possible.

Here's another important principle that I want to share it with you before we close this session. The best time to make a decision is before you have to make a decision. And so that's why, each of these areas, I just gave them to you in the order priority, are part of my daily personal plan and I review them at least weekly. Because I want to make decisions in these areas that simplify thousands of other decisions for me in the future. And that when I'm faced with challenges in the heat of the moment, I'm not trying to make a quick decision or I'm not trying to make a decision to get myself out of the challenges. I've already settled that.

And so, as you work through personal plan, you're going to think through things in a systematic way, in a calm way, with clear mind and and clear heart. And you're going to think through, "What are the things that I need to be doing on a regular basis to get maximum network in this key area or relationships of my life?"

A couple quick tips. Don't get all caught up when you are writing your list of people and you're kind of massaging this list. Don't get all caught up and, "Okay, do you have the right people? Is this all good?" Here's what we need to understand. This is just a start. We're starting a journey that we're going to continue. It's flexible, it's dynamic. We hold it in with an open hand, with an open heart. As things change for us, as we make

progress in key areas, as we see other key areas slip then we make adjustments where is needed.

Here's our action items for today. Number one, finalize your list that you're going to start with when we use this as we go forward. So, you begin by writing who's at your funeral. I've given you a few more things to think about in this session. So go back to the section who is there in the personal plan guide and finalize your list. There we have seven categories, because we recommend no more than seven categories. So, maybe you are going to group some, if you wanted to add eight, nine and ten right now, you can do that. But I'm going to encourage you as you go through this to pair that down, to try to get that in to seven or less so you can be effective at making progress in each of these areas of your life.

Then number two, second action step, once you finalize your list, I want you to copy and paste that list into the Guidestone University Leader Community and Facebook. The reason why I want you to do that is because it allows people to give you feedback. This is foundational to your life and to your work and it encourages you as you make progress here. Got it?

We'll see you in the next session of Guidestone University.