Creating The Awesome Life Experience!

A Step-by-Step Personal Strategic Planning Process for Creating Your Preferred Future.

By Kevin Daum
www.KevinDaum.com



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Creating The Awesome Life Experience!
Kevin Daum's Strategic Planning Process

Kevin Daum
www.kevindaum.com
kevin@kevindaum.com

Introduction

So you want the Awesome Experience in your life. That's the reason you asked me for instructions on how I plan. Well, here it is in great detail. I hope it helps you achieve the life of your dreams. If you would like more information on this process, you are welcome to contact me by email anytime.

If you would like me to help you with your planning, I do offer coaching services and retreat facilitation. You can check out www.kevindaum.com/future or contact me by email and we can discuss your needs.

In this document are the specific steps I take on a retreat to figure out who I am and who I want to be. It may seem like this approach is long and involved, and it is. But planning and executing an awesome future requires not only desire, but fierce commitment and consideration. Not everyone is ready, willing and able to take control of their own future. But this is a great way to start.

I have provided step-by-step instructions and the examples from my own personal planning session. Some may wonder how I can share without concern for privacy. Simple, part of creating an awesome future is sharing so others can help and benefit from your experience. I encourage you to do the same. You can start by sharing this document.

The most important perspective to consider in this entire process is this:

This is not about what you want to do:
It's about who you want to be.

If you want to be Awesome, Read on.

Before You Start

Here are some beginning steps you should follow before you get started:

1. You must read these 6 articles at www.kevindaum.com/inc:

   - *7 tips for Creating Your Own Destiny*
   - *Make Personal Failure Worthwhile*
   - *5 Ways to Make Your Own Happiness*
   - *Stop Killing Your Credibility*
   - *Nice People will Sabotage You*
   - *The Case For Humor*

   You may have read these before, but read them again since they will definitely set the right tone for your retreat approach.

2. Find an Accountability Partner. Here is some criteria:

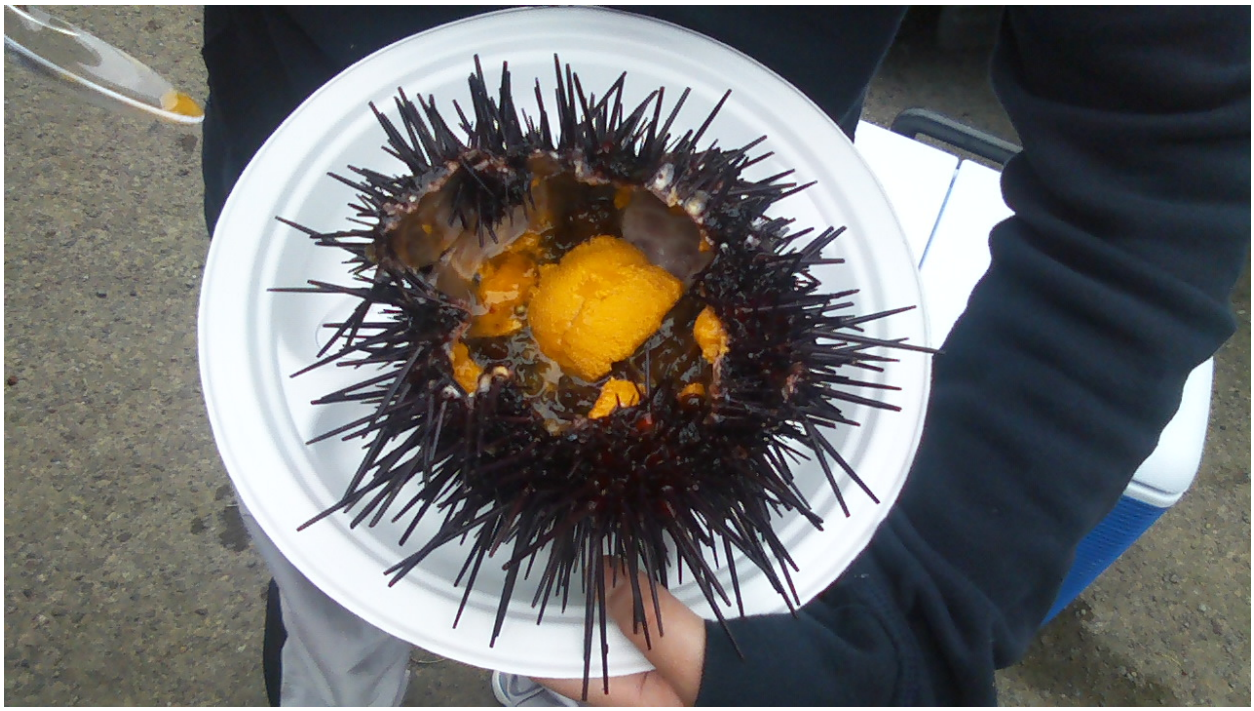
   a. He or she cannot be your spouse or significant other.
   b. He or she cannot have a personal stake in your day-to-day life and future. (No employees, creditors, immediate family, etc.)
   c. He or she should be someone who is highly motivated to achieve his/her own future and stick to this process.
   d. He or she should be someone who does not take shortcuts.
   e. He or she should be someone who knows you well enough to understand you and your patterns.
   f. He or she should be someone who is not afraid of hurting your feelings with brutal honesty.
   g. He or she should be someone who is easy to reach and keeps appointments.
   h. He or she should be someone who keeps commitments.
   i. He or she should read and resonate with the above articles.
   j. He or she must be someone you like and trust.

3. Set a date for your retreat. You will need at least 3 full days. Weekday or weekend doesn't matter, but you need a full 72 hours to work through this process. You don't want to rush it. The idea is not to get this done fast, but to get it right.

4. Find a fun relaxing location. My recent retreat was in Mendocino, CA. There was good food and great areas to hike, kayak and talk. Natural scenery is very grounding for deep discussion and provides mental soothing when dealing with difficult and profound issues. Exploring large mountains or oceans also has a way of keeping things in perspective since even a 100 year life of significance will pale in comparison to a glacier, 1000 year old trees or the power of the sea.

5. Remove or address all distractions. If you need to be connected to the world to relax then don't turn off your mobile for the whole trip. Do what ever you need to focus your brain and heart on the task at hand. Just make sure that you set aside undistracted time for the exercises themselves. You'll find that discussions will occur throughout your retreat. Take advantage of them.

6. Relax and have fun! This is your future, dammit! It's supposed to be exciting and inspiring! Set up physical activity to stimulate your brain. On my recent trip we went sea kayaking through rock caves and hiked along the dunes. We ate great meals with good wine and tasted in some of California's best wineries. We even had an unexpected event when divers brought in fresh sea urchin and fed us freshly killed uni right there on the beach. It definitely made the trip the awesome experience.



Establishing Personal Core Values

Before I begin the retreat I review and consider my core values. These are values that guide me in the way I should and shouldn't lead my life. They are not aspirational; they are standards that I live everyday. When forced with a choice of action or decision, I will look to these values to instruct me on my course of action.

- **Truth** – I focus on finding the truth and sharing it with those around me. I have no time, patience or energy for lies and rationalizations, mine or anyone else's.
- **Diligence** – I believe in delivering what I promise, otherwise I don't promise it. I make every concerted effort to get to the truth of a matter even if it's not in my own best interest.
- **Creativity** – It's easier to do things the same way every time but I chose to be a leader, and that requires engaging the creative part of my brain to break new ground and deliver the Awesome Experience, every time. Even when I would rather take the easy way, I challenge myself to consider and execute creative solutions.
- **Impact** – I have many opportunities and much I would like to accomplish. There is a finite amount of time and energy in a given day or lifetime. In determining where to apply my resources, I look for opportunities where I can make the most impact using the smallest amount of energy. I need a big Return On Energy (ROE) to justify engagement with someone or something otherwise I will ultimately accomplish nothing.
- **Consistency** – I do what I say in the manner I say it or I shouldn't say it in the first place. As a thought leader, I preach and teach. I am still human and sometimes forget my own teachings. This Core Value reminds me to practice what I preach when faced with a choice.

My core values won't and shouldn't work for everyone. Finding your core values is a long and introspective process that can take years or decades. Don't let that stop you. Keep track of your guiding principles as you live life and make decisions. The more aware you are in the decision making process, the easier it will be for you to identify patterns and establish your own set of guiding rules.

For more on Core Values you should read the following books: *Built to Last* by Jim Collins and *Mastering The Rockefeller Habits* by Verne Harnish. Although these are both excellent business books, the approach applies in a personal manner as well.

Establishing a Personal Mission

Many companies have a purpose or mission. I believe it helps to have a guiding reason that drives you forward. It is another guiding force in your daily decision tree. However, I do believe that many people make too much of having that mission be altruistic or socially relevant. For some who are economically disadvantaged, their purpose is simply to survive.

I do not chastise those who choose a personal mission of wealth or materialism. Neither do I overly applaud those who claim to be purely focused on the good of others. Some people are just naturally destined to be rich, benevolent, or powerful. (Proven statistically) It doesn't in my opinion make them better. I honor equally, the parents that raise their kids to be righteous people. I honor equally those who raise families of happy and healthy middle class people who do no harm to others.

I simply believe people should focus on their passion and desire wherever that may take them. All that being said, here is my personal mission:

To Inspire People to Pursue the Awesome Experience.

(The convergence of Need, Entertainment and The Unexpected)

This is not altruistic on my part. It is a statement of condition of the world, which frustrates me with constant mediocrity. I am not naïve enough to believe that I can rid the world of mediocrity, nor do I believe I should try. I do however believe that if I inspire people around me to pursue the awesome experience, then I will get to experience much more *Awesome* in my life and less *Mediocre.*

This mission is the guiding light in all of my writing, speaking and consulting. It is at the core of who I am and where I am going. It helps determine with whom I spend my time and resources and how I spend them. Any actions I take in conflict with my interpretation of this mission would in my mind brand me a hypocrite and failure.

Defining Success

When my friend *J* and I set out on this last retreat. We engaged along the way in a discussion of the definition of success. We know many people who claim to have achieved success and some irrefutably. Some have great material wealth but little time or energy to do anything with it.

We quickly gained the realization that achieving a successful future wouldn't have any benefit if we couldn't recognize it and enjoy it when we got there.

Some aspects of success were a given. Health and happiness were a fore drawn conclusion since we want to be able to enjoy the success we create. We had discussions about material wealth as well but there was no particular amount that we could define as successful. In my case, I had great materialism previously and had lost it as well. Today, I like my simple life and certainly enjoy nice things, but no particular car, real estate or amount of money in the bank can define my perspective on success.

J and I banged around on this discussion for a few solid hours and finally though careful deliberation I was able to define what success means to me. Here it is:

A daily abundance of legitimate opportunities come my way passively, so I can pick and choose the ones that are best for me in a relaxed and thoughtful manner.

I love what I do and I love creating opportunities and wealth out of my brain. However, I still work very hard to meet the right people and figure out how to convert my ideas and actions into wealth and time.

When I have achieved the credibility and stature as a thought leader where smart capable people are coming to me regularly with appropriate opportunities that benefit them and me in a volume that is beyond my capability, then and only then will I be able to claim I am successful. Then, I can have all the wealth or experiences I wish to have at my discretion and on my terms.

One last thought on wealth. Money is a commodity with little intrinsic value. The commodity that is precious is time. How I spend my time is my most important consideration when choosing people and activity. Success means the freedom to choose.

Spend some thoughtful time on what success really means to you.

The Preferred Future Process

This detailed process is my own expanded adaptation of a more basic process taught to me by a brilliant consultant and friend Robert "Jake" Jacobs. Jake is a change management expert who helps move mountains (of people) by giving them great perspective and understanding. For more on Jake check out his books and website at: http://www.windsofchangegroup.com.

Jake introduced a short version of this process to me around 2006, when he facilitated a retreat I attended of 9 successful CEOs. I have since expanded and improved upon the process in my own leadership retreats, which I facilitate regularly. This 2012 version is the most recent expansion. If you have any additional suggestions of improvement or best practices by all means email them to me at kevin@kevindaum.com. I may post them or incorporate them for improvement, and in all cases, will credit the person who originates the practice.

Materials Needed

The only materials you need for this process are a small notebook or journal and a pen or pencil. Pencil is better if you don't want to have scratch outs or are not good at forming words and phrases in your head. I use a 4" x 6" journal that has a New York City theme. The style does not matter. It's important that the book is easy to write and has a look or theme that makes you want to keep it and look at it every day. I use the same notebook for every process until I fill it so I can chart my progress from retreat to retreat. You can find plenty of choices of journals and notebooks at Paper-Source.com.

Timing

It makes sense to schedule this retreat once a year since that seems to fit with most people's planning. However any time you have significant changes in your life you may want to reset your future trajectory by scheduling an additional retreat. If you have a major change in your job or love life you may need to reconsider your plan even if it has been less than a year. I myself experienced significant changes with the failing of my business in the 2008 financial crisis and subsequent ending of my 24-year marriage in 2010.

Although I tried to engage in this process at that time, I did not have enough internal information to accurately set a plan and follow it. It took me until 2012 before I could gather and truthfully assess enough information about who I am, what I want, and what was really important, to make effective decisions.

Approach – Set a Specific Timeframe

It's important to deal in as many specifics as possible. For our session, *J* and I decided upon our 60th year as a reference point for the long-term exercises. We are both currently 47 and it was important that the future date was at least 10 years away. 60 seemed like an appropriate milestone. You can choose a birthday or specific year, just give yourself a long enough runway to absorb whatever the world might throw your way.

Attitude

Don't get frustrated if you find you don't have clear direction in this process even if you are on the retreat. Often, surfacing areas where you lack clarity can be as valuable as setting a specific course. Simply accept that your life is a work in progress and use the retreat time to go as far as you can. Once you have identified the obstacles, you can work on removing them and schedule the next retreat.

Taking Breaks

This process, if done right, is long and involved. It should tax your brain and your emotions. Take breaks whenever you need them to stay fresh and excited. At the very least, take breaks between each exercise. Go out and be physical. Enjoy your surroundings. The more you engage with pleasant visual and external stimulation, the better your mind will focus on the work. Sleep when your tired, eat when you are hungry, drink when you are thirsty and rest when you are weary. The results will reflect how well you treated yourself in this process.

Using an Outside Facilitator

An outside facilitator helps in 4 ways for this process:

1. The Facilitator can handle all of the logistical issues such as location, food and scheduling allowing you and your partner to focus mainly on the content.
2. The Facilitator can bring methodology such as exercises and discussion techniques that will get to the truth more effectively and efficiently
3. The Facilitator can bring objectivity. Since they are not emotionally involved, they can identify possible blind spots and offer fresh and impartial perspective.
4. The Facilitator keeps things on track and keeps discussions from heading down unproductive paths.

If you would like me to help you with your planning, I do offer coaching services and retreat facilitation. There is more information in the last section of this document. You can check out www.kevindaum.com/future or contact me by email or and we can discuss your needs.

Step-by-Step Exercises

Outlined below are the exact exercises I use on the retreat, in order. I have included my own personal answer examples to help you. Don't rush the process. 3 full days should be ample time to complete the work if you are focused and diligent. You should have plenty of time to work through issues and still have fun.

If you are concerned you can't manage the process or timing effectively yourself then hire an affordable facilitator. Don't force the process just to complete it. As a great friend and facilitator, Howard Getson taught me, in facilitation, the objective is not to get where you're going, rather to always arrive at where you need to be.

STEP 1: Establishing Major Areas of Responsibilities (M.A.R.S.)

Before you can plan for yourself, you need to establish who else has a stake in your life. What are the roles you play and who is dependent upon you for that role? The hard part of this exercise is not determining who has a major stake but rather who does not.

Here is my personal list:

1. **Husband/Lover**
2. **Thought Leader**
3. **Personal/Self**

My list is small because my life is simple. I have no employees, so I don't have to recognize being a boss or entrepreneur as a major area of responsibility.

The order is important to me. In my mind, it does not diminish the priority of the roles but rather emphasizes why they are critical to my success.

My wife, Van, is the love of my life, and I enjoy putting her at the front of my priorities.

The role of Thought Leader is the term for who I am as a writer, speaker, and consultant. It represents how I use my talents and smarts to impact others around me, make a living and generate opportunities. I love what I do and want to give it priority as well.

I have to make myself a priority as well. I must accept that responsibility to have any control over my life and destiny.

If you are a parent, you could list that as a role as I had in previous years. In my case, my responsibility to my 21-year-old-son is not listed on here because he is in his senior year of college and in control of his own life financially and logistically. I consider him to be a

minor area of responsibility now and therefore does not figure into my future defining process. It does not mean I am unconcerned with his future or love him any less.

Similarly, I live very independent of my parents and my sister. While we are supportive of each other's lives, we are not heavily engaged and therefore again these responsibilities do not merit consideration as a major area of responsibility in my planning. Others may need to list their role as son, daughter, brother, sister, etc. as the nature of their life dictates.

There is no right and wrong here. It is your life and you must be truthful with yourself about the stakeholders in your actions and destiny. Often, this first exercise will raise questions that need to be addressed about family and work. Great! Use the opportunity to dig in to the discussion. The only role that is consistent for everyone is the responsibility to your own self.

This exercise will take about 15 minutes to write down your initial list. You may need a longer discussion with your partner to challenge each other on areas that may or may not be truly major or were accidentally omitted.

STEP 2: MARs Word Association

In this stage, you want to understand more deeply and specifically the responsibilities that go with these stakeholders. This is accomplished thorough simple word association. Take quiet time to write down all the appropriate words or terms describing what you are responsible for doing in each MARs role. Here are mine:

Husband/Lover	Thought leader	Personal/Self
Inspirer, supporter, initiator, stabilizer, teacher, partner, stress-reliever, entertainer, adventure creator, challenger, Instigator, opportunity generator	Communicator, inspirer, provocateur, opportunity generator, humorist, messager, instigator, facilitator	Opportunity generator, health monitor, critic, entertainer, leaner, networker, revenue generator, challenger

You'll notice that I duplicate several words like *challenger* and *instigator.* This is fine. The words reflect who you are in that particular role and you are bound to overlap or duplicate.

This exercise will take about 30 minutes to write down your words. You may find yourself going back to add words later in the session or even days or months later. This is fine. More description is better than less.

STEP 3: Creating Descriptive Titles for your MARS

The word association step should be helpful in understanding the deeper meaning of the MARs. Now it's time to represent that on paper in a way that makes sense to you and those around you. Take the time to create a descriptive title for each of your MARs.

You want to include the key words from your association if not in the actual title at least in the representative spirit. Here are mine:

Husband/Lover**: Van's Inspirational and Stabilizing Adventure Partner**

Thought leader**: Inspirer of the Awesome Experience**

Personal/Self**: Realizer of Potential and Opportunity**

This exercise will take about 1 hour and can be done together with your partner. Some people are better at writing and phrasing, so help each other. Challenge your partner if you believe they have missed something or the words don't make sense. Make sure the titles truthfully describe the role you must play for success. You may find yourself going back to adjust the titles later. This is fine. Work hard to get something on paper that is meaningful and memorable to you.

STEP 4: Imagining Significance in 2025

Time to get out the creativity. Now that you have established your MARS and hopefully have a descriptive sense of who they are, it's time to consider the future. This first exercise is designed to raise your sights to what you can accomplish if you put your mind and energy to it.

Here is the assignment:

Write a Press Release about your preferred future at least 10 years from now. (In our case, 2025.)

The press release must have a headline worthy of my writing it on Inc.com. That means simple growth or anniversary stories are uninteresting and unworthy, as are human-interest stories. This is about impact and accomplishment. Think about competing with other stories.

The press release must have 2 or 3 supporting points. Make it interesting and entertaining. Explain what happened and why it matters. Use detail to explain what is going on with you and the people that are impacted by you.

The press release must have a quote. The quote doesn't need to be from you. It can be from someone impacted by you.

Be creative. Come up with something special and significant. Change the world. Word of caution, however, be realistic. Ambitious is fine, but if you land on Jupiter and greet space aliens, you will lose value having missed the point of the exercise. The real fun is coming up with something unexpected yet truly achievable. And it should fit with your core values, mission, and definition of success. Here is mine, note how it tells what I should be doing in 2025:

Make 'em Laugh! New Study Shows Humor Creates Jobs!

A combined study of NYU's Sloan School of Business and Yale School of Drama showed that companies who intentionally incorporate humor in their communication achieve faster rates of growth, higher production, and higher employee retention levels.

The 5-year study was completed this year and published by best-selling author and adjunct professor Kevin Daum and his research partner Professor Gilbert Gottfried who turned to teaching after loosing his Aflac endorsement in 2011 due to inappropriate Japanese Tsunami comments.

Several Fortune 500 companies have already incorporated humor, creating a CHO role of Chief Humor Officer to drive the entertaining approach. Asked how this started, Gottfried said "Two funny short Jews walk into a bar…"

STEP 5: Scheduling the Perfect Day in 2025

If all went well in your press release, you now have a sense of who you are at your goal date. It's time to paint that picture more clearly to see what details you can learn about your preferred destiny. This exercise is simple:

Take a page and create a schedule of hours from the time you get up until you go to sleep. I sleep an average 7 hours per night so mine goes from 8AM when I wake up until 1AM in the morning when I usually fall asleep.

Establish a typical, productive day like a Wednesday. It should not be a holiday or special day, just a typical day in your life. Now with as much detail as you can, describe the day. Try and put down details that relate to other days of the week or other activities in your life even if they don't occur on that day.

This exercise should take at least 2 hours. The more detail you can write the greater the insights into your desires for a perfect life. If you feel really super ambitious, take more time and detail out an entire week.

Here is my perfect day at 60 years old:

8:00 AM – Wake up without alarm, lean over and kiss my wife, Van. Clean up and read another chapter in the latest Erik Larson novel.

9:00 AM – Put on biking gear and head out on a 25-mile ride around Manhattan.

10:00 AM – While riding and enjoying the fall foliage, I ponder the next 3 columns for syndication.

11:00AM - Arrive home and shower. Call *J* to see if he is still alive. (He is 60, after all.) Have a healthy lunch of chorizo and cheese.

12:00 PM - Crank out one of the columns from the ride and add it to the stockpile, ready to go ahead of deadline.

1:00 PM - Respond to correspondence and set up appointments with my mentors and new opportunities. Research the people I'm meeting.

2:00 PM - Meet with my mastermind group and check in on accountability of our projects. Discuss new opportunities coming our way.

3:00 PM – Work on lesson plan for Friday NYU class and tune up new book proposal.

5:00PM - Start cooking a new recipe to surprise Van for dinner.

6:00PM - Welcome Van home. Conversing 30-minutes each in Spanish, Vietnamese, and Mandarin, we discuss our day and our upcoming Europe and Asia travel plans.

8:00 PM – See an off-off-Broadway show with Van and friends, and have dessert at Chikalicious after.

10:00PM - Walk home, window-shopping for clothes along the way.

11:00PM -1:00AM – We have hot fun sex with lots of banter and then watch season 14 of Game of Thrones in holograph before cuddling ourselves to sleep.

Note how my other activities like teaching come up and I am able to establish the timing through description of the season. Have fun with this. It's your day.

STEP 6: Establishing a Big Hairy Audacious Goal (BHAG) for 2025

Jim Collins talks about BHAGs in his book Built to Last. A BHAG is a clear goal at least 10 years out that gives you the point at which you can aim your path. 10 years is enough to change course and activate any forces you may require to make things happen. As Verne Harnish says, it should be audacious, but not braggadocios.

Some people may use materialistic items such as a Ferrari, or a beach house in Malibu as that BHAG and that's fine. Those BHAGs effectively represent the need to accomplish a certain amount of material success and you will have to envision all the details describing what it took to get there.

The Press Release and Daily Schedule should give you some insight into the powerful goal that will motivate you to work harder in a more disciplined manner than ever before.

Here is my BHAG:

Money is not a consideration in my daily thought or activity.

To some, this may seem like a strange BHAG and not very descriptive. But I would beg to differ.

In my case, my transition in 2008 was financially significant. I lost my business, my homes and my credit. It left me with debt and few resources to rebuild my life. In spite of that, I have reinvented my career and created income. Now, I am committed to being debt free and independent of any decisions that require money for survival.

The implications of such a BHAG are as follows:

1. I will be debt free
2. I will have sufficient income and assets to maintain my desired lifestyle until my death
3. I will have passive income
4. I will have a lifestyle that fits within my financial goals
5. My daily considerations and activities will have little or nothing to do with money.

Not a bad life for 60. Now all I have to do is execute. Knowing this allows me to make decisions that are consistent with this vision. It helps me create filters for evaluating decisions and opportunities.

Choose a BHAG that is significant to the way you want to live your life. This exercise will probably take 1 to 2 hours and contentious discussion with your partner. You must challenge each other aggressively on the viability and truth around this BHAG or it will be meaningless and useless. You may have to revisit this BHAG and modify later in your retreat.

STEP 7: Visual Mapping for your 3-year Future

Time to draw! Drawing pictures helps you change your perspective on your goals and desires. It engages additional parts of your brain and triggers effective memory, which is important if you want to achieve what you plan.

The exercise is simple but should be detailed. It should take an hour. Take 2 adjoining pages in your notebook and draw a diagram showing what your life looks like 3 years from now.

Put yourself at the center and create offshoots for each of your MARs. Each box should represent a description of what a certain aspect of your life is like as it relates to that MAR. If a box is connected to more than one MAR than find a way to connect them. It sounds confusing, but my example on the next page should help clarify.

Here are a couple of important things to consider in this exercise:

1. Don't make the boxes goals per se but rather statements of condition. State them as what's happening rather than what you want.

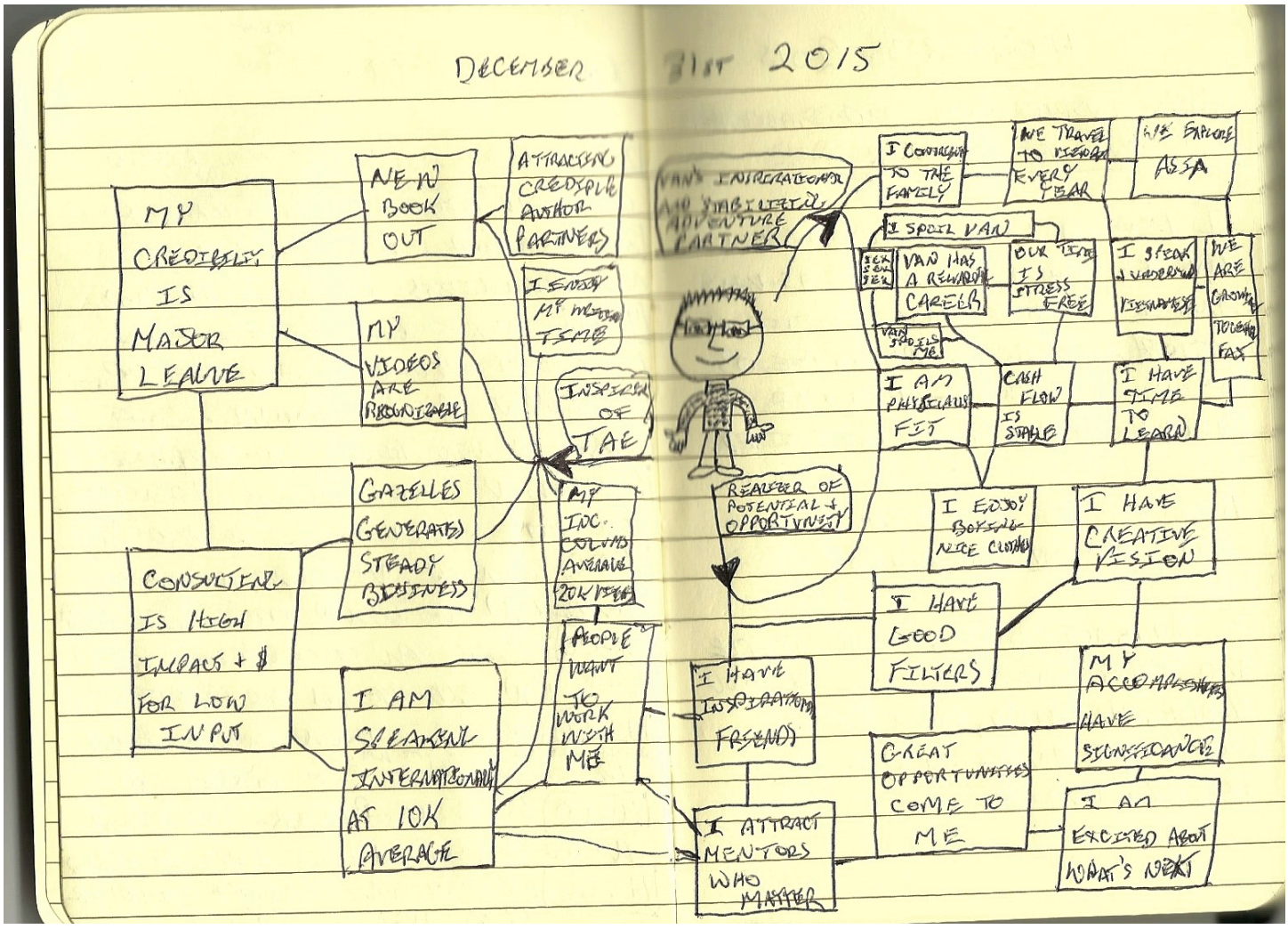
2. Let your creativity rule. No need to use my exact model. Make a visual representation that speaks to you. Just make sure the statements are clear, as you will need them in the next exercise.

3. Be as specific and clear as possible with statements that are tangible.

4. Make sure that all of your statements are consistent with your Core Values, Mission, and Success definitions, and are on the road to your successful meeting or exceeding of your BHAG. (Otherwise, what's the point?)

Kevin's December 31st, 2015 Visual Map

Don't worry if you can't read every statement in this picture. It will give you the basic idea and besides, this is my future. You need to create your own.



STEP 8: Preferred Future Statement for 3 years out

The picture you created was a free form way of expanding your mind and imagining your preferred future. Now you need to refine that mind expansion into powerful and inspiring statements of your desired future.

This exercise will take 1 to 2 hours depending how good you and your partner are at wording and writing. The best way to approach it is to work apart at first, creating a rough draft summary for each MAR. Then you can work together helping each other create a meaningful sentence that incorporates all your statements.

Here are my statements for December 31st 2015, consolidated from my visual map on the previous page. Note they are specific and only one sentence. This will make it easier for stating aloud when looking for guidance and inspiration.

Kevin's Preferred Future Statements for December 31st 2015

Van's inspirational and stabilizing adventure partner
I live a life filled with love, sex, and excitement as Van and I share our individual growth and accomplishments while exploring people, places, and opportunities.

Realizer of potential and opportunities
I attract significant people and opportunities by exuding health, happiness, creativity, success, and an open desire for learning.

Inspirer of the Awesome Experience
I laugh and have great fun daily as I attract and execute on an abundance of highly paid, major league, speaking, writing, and consulting opportunities that challenge and reward me, as well as my growing constituency.

It may seem that some of this sounds vague. It may to you, but there are certain code words I used that have great meaning to me. For example, I have an entire definition for "Major League" that I have detailed elsewhere that allows me to determine whether or not an opportunity fits that criteria.

Make sure the statements are clear, tangible and meaningful to you and your desires.

STEP 9: Living the Dream

Now that you have said it, it's time to live it. This exercise allows you to live in your new reality and get your brain to believe it's possible. I highly recommend using some leisure time for this exercise. It might be good to discuss and take notes over a meal or even over a nice bottle of wine.

You need about 1 hour for this exercise. It should flow free and easy. It's actually my favorite part of the whole process.

Take a page or two for each MAR and write a series of statements that describe what it is like to live in your preferred future described in the previous exercise. Start every statement using one of the 5 senses:

I see…
I hear…
I smell…
I taste…
I feel…

Here are my personal examples:

Van's Inspirational and stabilizing adventure partner

- I feel Van's love and excitement with each new adventure.
- I hear appreciation from my in-laws for the ways I have helped the family.
- I hear who my mother-in-law is as a person since we can converse in Vietnamese.
- I see and hear Van laugh and smile every day.
- I see Van achieve and strut with accomplished pride.
- I smell the new products and see the sexy new clothes as Van rewards herself.
- I feel Van's love and appreciation when I spoil her.
- I feel the warmth of Van's cuddling when she is smitten.
- I feel my own growth and vulnerability when Van challenges me.
- I taste the exotic foods as we travel to distant lands.

Realizer of Potential and Opportunities

- I see my fit body in the mirror.
- I feel 15 years younger than my age.
- I taste the great food and wine at meals with significant people.
- I hear the Vietnamese phrases and understand them.
- I feel the pride of accomplishment from learning Vietnamese.
- I see my growth from time with my mentors.
- I hear the acknowledgement of overcoming my own obstacles from my mentors.

- I hear the laughter of my friends when we spend time together.
- I feel the excitement of the people around me when we embark on new adventures.

Inspirer of the Awesome Experience

- I feel the calm that comes with positive cash flow and reduced debt.
- I see the respect in people's faces when I teach.
- I see thousand of social media hits on my column.
- I hear my agents cutting great deals.
- I hear the AHA!s when I share breakthroughs.
- I hear the laughter at my videos.
- I see the hits and links to my videos on Youtube.
- I see the bank balances rise steadily.
- I see the bloggers link to my material.
- I hear the applause from the large crowds.
- I feel the comfort of business class flights.
- I hear the phone ring with new offers everyday.
- I see the emails with new opportunities.

Step 10: Identifying Obstacles to Success

There are many reasons we don't hit our objectives and build the life of our dreams. Some of those obstacles we create ourselves and some are beyond our control. The more honestly you identify your obstacles, the greater chance you have of overcoming them. In this step, your job is to identify as many as you can. Your partner should help you address them honestly and completely. This exercise should be done in conversation to make sure you are giving each obstacle the objective attention it deserves.

This exercise should take at least an hour. You need to identify 3 types of Obstacles that stand between you and your preferred future:

1. **External Obstacles** – These are obstacles that are unrelated to you directly and you have no direct control.
2. **Internal Obstacles** – These obstacles are related directly to you or you have some control over their cause and they are one-time obstacles you must overcome.
3. **Habitual Obstacles -** These are obstacles you create for yourself through your own habitual behavior.

With all obstacles you must find ways to overcome them, if you are going to achieve your dream future. They are numbered, so you can quantify the work ahead. Some will require changes in behavior; others will require creativity and experimentation. The fun going forward is knocking them out of the way one by one and celebrating your success.

Here are my obstacles broken down into the 3 categories:

External Obstacles (no control over cause)

1. The extra communication noise in the world
2. People are overly busy (harder to get their attention)
3. Communication methods are in flux (total disruption)
4. Sales cycles are slow
5. Learning Vietnamese is hard and there isn't a Southern dialect learning system
6. Marketing costs money and/or time
7. Partnerships are iffy
8. I have no easy access to capital

Internal Obstacles (some control over cause)

1. Outstanding Debt
2. Van's not yet determined her clear career path
3. No surplus cash yet
4. My network may not be right yet
5. I don't yet have the right mentors
6. I am not my best salesperson

Habitual Obstacles (total control over cause)

1. I need downtime and there is not enough downtime right now.
2. No stable home time due to travel
3. I struggle with a rhythm of writing
4. I hate working out in the cold or gyms
5. I love food & booze (Who doesn't?)

STEP 11: Establish 1 year Commitments

It's time to commit to your future. The target now should be roughly 1 year out. All of the objectives should be realistic, tangible and measurable. They should be obvious milestones to your 3–year preferred future statements, and they should be aimed at removing obstacles or at the very least should take the obstacles into account.

This is the place where you have to be most pragmatic about what you are willing and unwilling to do. Your partner should challenge you on every aspect of this list because your failure will be theirs as well. If you know you won't do something, then just admit it and don't put it on the list. You might have to adjust your preferred future to reflect the actions you are truly willing to take but that's better than disappointing yourself.

There is no right or wrong amount of goals on this list. You now know where you want to go. The list of tasks to get there should be fairly obvious. Motivation is now your responsibility. Give yourself 1 hour to make and discuss this list with your partner.

Here is my list for the next year. I know I will be accountable because you all will probably ask me how I did on January 1, 2014, and I don't feel like being ashamed.

December 31, 2013

1. Have basic Vietnamese understanding
2. Weight 168 lbs., 3 months in a row
3. I am independent of Van in business
4. I have 2 committed mentors
5. $X in bank, $X debt reduced
6. 3+ bureau referred speaking gigs
7. 6 columns in the can – posting weekly
8. 3+ Gazelles coach sponsored events
9. 2 international growth summits
10. Inc. column minimum 10K+ viewers per column
11. I created 2 profitable Awesome Experiences
12. I am caught up on Madmen, Newsroom, Game of Thrones, and Boardwalk Empire
13. I have fished 20 days
14. New book proposal related to humor to Agent

Obviously, these are my objectives so you may not understand them all but they all relate to the work in previous steps. The TV shows for example are tangible ways of ensuring I had sufficient downtime as stated in my obstacles. Many goals are integrated to meet several objectives and eliminate obstacles in an efficient and combined manner. That's the fun!

STEP 12: Create 30/60/90 Day Action Steps

By now you know what you have to accomplish, now you need an action plan to get there. Set out your dates for 30, 60, and 90 days. Use the next discussion with your partner to determine the specific action steps required to meet your 1-year goals. This will take approximately 2 hours. The action steps should be fairly obvious. If not, your partner will be a good sounding board to determine what's missing. Notice, they all begin with verbs since they are all actions you must begin to successfully meet your 1 –year goals.

Here are mine with the dates, they should be self-explanatory:

30-Day Plan (by 9/20/2012)

1. Begin 2 glass of wine/cocktail per week regimen (No beer)
2. Begin 4 hour body diet
3. Begin 6-8 hour per week exercise
4. Find a Vietnamese teacher (Southern Dialect)
5. Close trade deal with Inn at Tabb Creek
6. Launch bureau mailing #2
7. Have call with Gazelles about Europe, Australia, and Video Contest
8. Create and offer personal strategy retreat to followers and forum chairs

60-Day Plan (by 10/20/2012)

1. Write column weekly
2. Have Joey start Bureau calls
3. Resolve NYC writing space
4. Begin Vietnamese lessons
5. Establish Date night weekly
6. Create an ideal mentor list
7. Set a new TAE Rockefeller Habits Plan
8. Establish Highest/Best opportunity list for 2013

90-Day Plan (by 11/20/2012)

1. Write an extra column after every 6 columns
2. Establish 2013 travel & speaking calendar
3. Begin networking for mentor contacts
4. Go fishing at Inn, schedule trip for fishing
5. Clean up email
6. Systemize Gazelles and Forum marketing process.

Establishing a Rhythm of Accountability

With a plan in place, it's now up to you to work the plan. If you are someone who is self-accountable, good for you! Go get your future. If you are like most human beings, you will need some support. That's where your partner comes in.

You need to establish a check in rhythm. It doesn't have to be exhaustive. It's best to keep it simple. Even if you and your partner are on different sides of the world you can arrange time by phone, Skype or Facetime. Even email is better than nothing. There are no excuses. That's what accountability partners are for.

Here is what *J* and I agreed to:

- Every week, we will have a 20-minute phone call to check in and see if we are both on track.
- Every month, we will have a 1-hour discussion to assess our progress.
- Every quarter, we will do our best to get together so we can set our new 30/60/90 day plans. At the very least we will do it by phone or Skype.
- Every year, we will go away for 3-Days to reaffirm the entire process, and enjoy each other's company.

Remember, your job, as an accountability partner, is to hold the other person accountable. It is not OK if they have not taken the action step they committed. It is not OK if they missed the goal. If they are to reach their preferred future, they must commit and be committed.

No one said this would be easy for either or both of you. I only suggested it would be rewarding and worth the challenge and commitment.

Good luck. Have an Awesome Future! Let me know how it goes.

Kevin Daum

How I can Help

Hopefully, this treatment has given you what you need to get started on creating your Awesome Future Experience.

You may decide after reading it that you want some further help from me.

I am happy to do so. I am available for consultation and facilitation of this process. Here are some options with the details below:

1. **You can hire me for phone or Skype consulting -** When I consult by phone or Skype, I will provide you with a 3-hour package. In the first session, we discuss your needs. In the second session, I prepare you and your Accountability Partner for the process ahead. Then we finish with a follow up after your retreat, where I review any materials you share with me and give you my thoughts on what else you need to make this process stick. The 2012 price for this service is $495 USD.

2. **You can attend a retreat scheduled by me -** If you wish to attend one of my retreats, contact me and I will alert you when I have one coming up so you can attend. The typical cost of attendance is $1,495 USD per person, or $2,495 USD if you and your Accountable Partner sign up together, plus any travel and activity expenses. This varies depending upon location and the size of the group. Sessions are typically 3 days plus travel. I usually try to limit to 8 people so there is plenty of time for personal attention. If you don't have a partner you can get one at the retreat. I always make sure everyone is matched up somehow and the attendees are committed.

3. **You can hire me to facilitate your retreat –** If you are interested in having me come to facilitate your private group, contact me. I can facilitate groups of 2 to 8. I can help with all the planning and even provide a location in North America. My rate ranges on the time and travel required.

In all cases, I will make sure that we speak briefly up front to make sure I am the right person for your situation. I hope this document has been useful for you and I wish you success in pursuing your Awesome Experience.

Best,

Kevin Daum
kevin@kevindaum.com

About the Author



Kevin Daum is an award-winning and bestselling author of 5 books. He is a marketer, speaker, and columnist for Inc.com and Smart Business Magazine. He is an Inc. 500 entrepreneur whose sales and marketing techniques resulted in more than $1 billion in sales. Drawing on his background in theatre and business, Kevin is a compelling speaker who has engaged and inspired audiences around the globe.

Kevin has authored several books, including Amazon #1 Best Sellers *Video Marketing For Dummies* (Wiley) *ROAR! Get Heard in the Sales and Marketing Jungle* (Wiley), and *Green$ense For the Home: Rating the Real Payoff on 50 Green Home Projects* (Taunton), which is the 2011 winner of the American Society of Journalists and Author's (ASJA) Outstanding Book Award. He also penned the best selling *Building Your Own Home For Dummies* (Wiley), and *What the Banks Won't Tell You* (Grady Parsons).

Kevin uses his expertise to help individuals communicate effectively and reach their personal and business goals. He has built multiple businesses, including Stratford Financial Services, an Inc. 500 company; Mystery is Served, an entertainment company; and most recently TAE International, which helps companies provide their customers The Awesome Experience by mastering compelling messaging, intentional marketing and memorable delivery.

Kevin consults to numerous companies and non-profit organizations. He speaks regularly in the areas of customer experience, creativity, strategy, and execution. He also coaches executives on book development and thought leadership, as his most recent book proposals went from concept to contract in a few short months with major trade publishers.

Drawing upon a degree in theatre arts and involvement in more than 150 theatre productions, Kevin is changing the way corporations use the arts as a training ground for business and entrepreneurship. Kevin's ROARing Video Seminars help companies develop effective and entertaining video marketing programs. As head of business development for Americans For the Arts' Creativity Connection, he facilitated unique arts-based-learning programs for Fortune 500 companies. Kevin has been instrumental in the development of interdisciplinary arts and entrepreneurship curriculum at Baylor University. He has published several articles on marketing and the managerial relationship between the arts and entrepreneurship.

Kevin is a graduate of the MIT Entrepreneurial Masters program and has received the Global Learning Award 3 times from the Entrepreneur's Organization, where he held several board positions. Kevin has designed, produced, and led award-winning executive training programs and events for C-level executives and entrepreneurs on four continents. Previously, Kevin was named one of the 40 people to watch under 40 in San Francisco by the Business Times and in 2006 was named Distinguished Alum of the Year by his alma mater, Humboldt State University.