



The Life Planning Session

The Foundation of Business Planning and Organization Design

The literature of leadership emphasizes clarity of Vision as essential for leaders. Vision that matters is not so easy to come by. “Let’s grow fifteen percent next year!” is not a Vision. Vision means digging deep into your own heart and mind, and thinking about your life’s meaning and purpose. For a couple (or business partners), lack of a common Vision is the most prevalent reason for strain in the relationship in my experience. When a couple, or partners have a common dream, it pulls them through every bump in the road. Without a common dream, every bump in the road is a mountain to climb over.

For many years I have conducted two-day Life Planning Sessions with my clients. In this structured process, we answer four important questions:

1. What do my spouse and I need and want out of our lives?
2. How can the business help us accomplish this?
3. What would the business need to look like in order for it to best serve our aspirations?
4. How do we get it there?

Central to the Life Planning session is creating alignment, a common Vision as a foundation for any business planning effort. In this way, both parties can see “what’s in it for them” when the demands and challenges of the business create stress and sacrifices.

Equally important, it creates the basis for designing the business effectively. A business is a design problem, although most CEOs don’t look at their businesses that way. The nature of any design process starts with the question, “What is the function of this thing we are to design?” Very few entrepreneurs will ask the question, “What is the function of this business in my life?”

The obvious answer is money, but there are many other dimensions to a business and a well designed business can feed you financially, professionally, relationally, intellectually, socially and emotionally for the rest of your days.

Conversely, if the function is not well defined and understood, there are two risks. First is that the design of the business will be arbitrary to a greater or lesser degree, and therefore intrinsically create inefficiency, confusion, turmoil and frustration.

The second and far greater risk is that the business will consume whatever energy you choose to feed it. If you haven't defined clearly your own personal needs and wants,

there is a very real risk of the business consuming too much of your life, creating an imbalance that puts at risk either your relationship with your own business, or your relationship with your spouse.

Answering these four questions builds a solid foundation for your strategic planning and organizational design efforts.

The rationale for these four questions defines the structure of the process.

The question, “What do we need and want out of life?” is based on the presumption that business is about living. Life is not about business. There are many ways to make a living in this world. A case can be made that the only justification for owning a business is that it provides you with a fabulous life, one that you will look back on with a deep sense of fulfillment. In this phase of the process we develop specific “life themes” that you and your spouse share along with the specific experiences, relationships and accomplishments that will be important to each of you between now and the end of your life.

The question, “How can the business help us accomplish this?” is based on the premise that your business does not exist to fulfill the needs of your customers or employees. It exists to fulfill the needs of its owners. That is the “why” of the business. Taking great care of customers and creating opportunities for employees are important, but they are the “hows”.

Once the first two questions are answered, we then have a set of design specifications with which we can design the business. In this phase of the process, we define very



Nothing prepared us for running a business like ours. The first few years were manageable, but then our business began to run us. It was frustrating, painful.

The two days we spent with you in Albuquerque were days of discovery, deep introspection, defining, projecting, and goal setting.

Nothing we had ever done before had made such an impact nor held greater hope for helping us turn our business into the vehicle for fulfilling our specific personal needs.

In the year since Albuquerque, we have been able to cut back the hours we spend at our business, comfortably boost our salaries, and have been successful in hiring personnel to help us grow far beyond where we are today.

John McManus, CEO

Magellan's Inc. (Three time Inc. 500 Company)
Santa Barbara, CA

specifically, the organization chart, the size, scope, markets and financial performance that is our desired reality. We know that things will turn out differently to a greater or lesser extent, just as an architect knows that the design process is an evolutionary one from the first set of plans to the final structure. In answering this question, we can also address the issues of culture and organization design, and your interest in the concept of self-management.

Finally, we address the planning process, to answer the fourth question, “How do we get there from here?” The planning process gives us a vehicle for pulling all employees into the process of change, and company leadership to identify those critical priorities that will move the organization most directly towards the desired reality.

The Life Planning Session is a stand-alone event. It lays the foundation on bedrock for a business planning and transformation project. Most clients want to continue working with me to help them implement the change process, but the session is just as valuable if you choose to take the ball and run with it yourself.

If you are interested in working with me, by the time we’ve gone through the two days together, I’ll know enough about you and your business to be able to give you a firm estimate of the costs for the first year or two.

These sessions are normally held in my offices in Albuquerque, NM USA. The reason is to get you and your spouse away from your normal daily routines and environment. This helps with your perspective and creativity. Sessions are normally scheduled for a Thursday and Friday, and I strongly recommend staying over for the weekend and flying home on Sunday. The reason is that having some time to gestate what you have learned and decided is an important part of the process. As soon as you get home, your business and family responsibilities will intrude so having some quiet time to just be and talk will be very helpful. Occasionally a client will ignore this advice and almost always will acknowledge that going home too soon was a mistake.



We start at a mutually agreeable time, usually between eight and nine A.M. and work until we get to a logical break point. Usually that will be five to six P.M., but working until eight or nine is fairly common. Another reason for some decompression time after the session is that it is hard work and some rest and relaxation are welcome after two intense days. Lunch is usually with me as my guests next door at one of Albuquerque’s premier restaurants. For dinner, you are generally on your own.

Albuquerque has good connections from everywhere through Chicago and Dallas on American, or Denver on United. Southwest has good schedules as well, particularly

from the West Coast. I suggest you rent a car. A wide range of nearby hotel accommodations include the Hyatt Regency, Embassy Suites, Doubletree, a lovely new hotel four blocks away, the Parc Central, and a couple of very nice Bed and Breakfasts within walking distance of my office, which is five minutes from the airport.

New Mexico is the “land of enchantment”. There is much to see and do. Santa Fe is a little over an hour up the road and is a completely unique community with world class culture, food, art, shopping and over four hundred years of history.

Dress is very casual. Jeans are the typical attire. Albuquerque is at five thousand feet so it does get cold in the winter. However, three hundred days of sun a year also means it may be warm during the day and cold at night. It is usually very dry, however, so even the coldest and hottest days are manageable.

The cost for the Life Planning Session is eight thousand dollars. With travel expense, this is a significant investment. However, there is real and lasting value.

You and your spouse will come away with a plan for the balance of your life based on the things you care most about.

You will come away with the life themes, common to you both, with which you will shape all your major life decisions.

You will come away with a detailed picture of the company you want to build, which has been designed to support the fulfillment of your life aspirations.

And you will come away with a road map for getting to that desired reality and the basis for an ongoing working relationship, should you desire that.

I learned very early on in my consulting career that what goes on in the closely held company is a very innocent reflection of what goes on inside the CEO. When he/she is clear, focused, grounded in accomplishing those things that are most important and meaningful, the company becomes energized and vitalized by that clarity of Vision. The coherence this process creates can have enormous impact on the quality of the rest of your life, and on both the quality and quantity of your business. From this point of view, this investment in the rest of your life is very modest.

If you or your spouse have any further questions, please feel free to call or have your spouse call any time.

My enthusiasm is reignited - the focus we were able to gain in two days exceeds the focus of the past five, maybe ten years!

Your ability to understand our personal and professional challenges allowed a very focused plan to emerge. Thank you, Lanny for being so very good at what you do. This has been one of our best business investments yet.

Kathleen Peterson, CEO
Powerhouse Consultants Inc.
Bedford, NH

Frequently Asked Questions

Q: What if we don't have or can't find a common dream?

A: In the years I have been doing this work, on rare occasions I've had couples who had to do some work to find the path of least resistance between their divergent aspirations, but I have never had a couple leave the session without feeling they had a clear path forward to a viable Vision in which both their interests were addressed.

Q: Can we do this where we live?

A: At times, for example if you have small children at home and don't have the infrastructure for long-term childcare, I'll come to your city. We will work off site, however, usually at a hotel suite, to get you away from the phones and domestic distractions. It is a bit of a compromise in the quality of the experience, but a reasonable one if it is absolutely necessary.

Q: My spouse runs the business and I'm not that involved. Why do I need to participate?

A: The first day, where we answer the first two questions I described, is just as much for you as your spouse. Home is the foundation of life and work. When as a couple, you are clear about your life trajectory, then the demands the business may make are easier to manage when you both are clear about what you're doing, why you're doing it, and that these sacrifices are taking you somewhere you both desire. The second day, where we design the business and planning process, may not be of interest to you and it isn't essential that you participate. On the other hand, the more you know about your spouse's work reality, the more interest you are likely to have in the project's progress, and it will enrich your sense that you are on the journey together.

Q: I'm single. Can I still do this?

A: Of course. Being single means the first two questions are easier to answer. I would still plan on two days, however.

Q: I have a business partner. Should he/she be involved?

A: There are two types of business partners, people who happen to own a piece of the business and those who are both part owners and actively involved in strategic decision making from an owner's point of view. In the former case, I would say no. Your job is to bring the Vision to the table. Their job is to decide whether or not they want to go there. For real partners, the second group, I extend the session to three days. One day with one couple and one day with the other couple to answer the first two questions. The third day will be with both couples or just the partners, depending on the spouses' level of interest in the business design process. On occasion, I have extended the process to four days when three partners were involved.

Q: I (we) have done some of this work already. Is it necessary to go through the whole

two days?

A: If you have been reflecting on your life and its purpose, this is helpful. It has been my experience, however, that few people do this in a structured, systematic way. The Life Planning Session will make good use of and build on whatever reflection, reading, thought, dialogue or introspection you may have been doing.

Q: It's a big investment. How do I know it will be worth it.

A: I have been doing this work for a long time and I'm very good at it. Inc. Magazine, the premier magazine for smaller companies thought enough of this work to write a feature article on it in a segment they called Face to Face. Others featured in this segment were the late Peter Drucker, widely considered the Dean of business thinkers and writers, and Saul Wurman, founder of the internationally acclaimed TED conferences. Aside from my experience, education (Fine Arts undergrad and MBA) and validation by the business press, I'm happy to provide you with references.

Ultimately, the question is "What's the rest of your life worth?" How much cumulative improvement in the quality of your life would you have to accomplish in order to feel that you had made a very wise investment? The transformation of a life doesn't necessarily require sharp turns. Shifting your life trajectory even a few degrees will, over time, take you someplace very different. My clients routinely come away exhausted, exhilarated, reenergized, and with a powerful sense of optimism that their business can truly work for them rather than their working for the business.

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Note: If you know someone who you think would find this information useful and important, please feel free to forward this document to them. Thanks.