

## This Appreciative (Open Mic) Hour: 7-29-09 Recap ... and More

### Harvesting the Highlights:

*Though we follow the same format each time, each Open Mic hour is different... and this week's OM was no exception. With just a handful of us (all males, as it turns out), it was a relaxed and flowing hour, which went to deep places. Through compassionate and skilled conversation, we helped a planner who requested names of good books that would express core financial planning values for potential clients, to realize that what he needs to give them is himself: his beliefs and values regarding financial planning, and what he offers. Another planner shared a wonderful story of how he retained two clients by letting go of trying to keep them in the fold. Here's the bonus: another OM participant "got it" about letting go, and proceeded to have a great conversation with a client. Rather than being attached to continuing the relationship, they agreed to "check back in a year to see how things are going." Read on, and learn about today's centering practice, details of the conversations we had, the "Resilience Retrospective" question I posed, and my initial reflections about community.*

**No Open Mic next week.** Open Mic will reappear on **Thursday, August 13 at 5:00 pm eastern time US.** (Wednesday, August 12 is our 6<sup>th</sup> anniversary: a good day to leave unstructured, wouldn't you say?).

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### The Path of Appreciation and Positivity©:

Thank you for your response to my *Department of Shameless Self-Promotion* notice about the Path group. If you are intrigued about this group that's forming for September but didn't receive last week's Re-cap, email me and I'll send info.

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### Open Mic Re-cap:

**Centering Practice:** I invited participants to make themselves comfortable (feet on the floor, hand off the computer mouse, eyes closed), and do the following simple breath meditation:

*"Take a series of slow, deep breaths; let the air go all the way into your belly. Feel the belly expand. Now, slowly exhale. Repeat this rhythm: slow deep belly-breaths, slow exhale.*

*As you breathe in, think "Breathing in, I am calm."  
As you breathe out, think "Breathing out, I am peaceful."*

*Repeat these phrases with the in-breath and the out-breath.*

*"Breathing in, I am calm."  
"Breathing out, I am peaceful."*

*"Calm."  
"Peaceful."*

*As you continue this rhythm, let your mind play with this scene: “Imagine this Open Mic hour was a great hour for you. What would have happened, and what would you be saying about it at the end of the hour?”*

After this guided meditation, I explained that the “great Open Mic hour” scenario is intended to tap into the person’s wishes, wants, and needs and in so doing, creates a vivid, positive image. This type of image is very helpful in fostering positive energy and motivation for the hour. I noted that it is good practice, as a service provider, to check back in at the end of the hour, about the positive image. For example: “*You said that if this hour was great, X would have happened. How close to X did we come?*” It’s a way of keeping faith with the implied promise in the “great hour” scenario. And it’s a powerful way to demonstrate integrity and deepen connection.

**“Any Burning Questions?”** A planner asked if anyone had a good recommendation for a book to give clients, or potential clients, to communicate his expectations and the nature of his services. He explained that if he could find such a book, it would serve better than his own explanations, acknowledging that “it sounds like I want to use it as a crutch.” The other callers on the line are all highly tuned-in people, and the responses were compassionately challenging. One participant, for example, noted that he felt divided; he’d like to offer a suggestion to meet the request, but he felt more strongly that the planner should make the connection with the client conversationally, rather than with a book. (I thought that was brilliant!) Another participant – a CFP who is now a certified coach – asked about the motivation behind the request: “*What are you trying to say, through the book?*” The answer: “*To articulate what I would like the planning conversations to be about: the meaning of money for the client; his/her money history; how closely their spending is aligned with their values.*” (I thought those were eloquent answers; perhaps more eloquent than the person credits himself with.)

The essence of the ensuing conversation, with the full and earnest participation of the person himself, was that he needs to *find his own voice*... that stating his beliefs and passions around financial planning is more important than verbal eloquence ... that in speaking from his own grounded beliefs and convictions, he would find his own brand of eloquence. I noted that, while he felt the book would be a “crutch,” the image I had was that of a barrier separating him from *connecting with the client*. I am delighted to say that, with this ten-minute OM conversation, our planner friend clearly recognized that the voice and the words he needed to offer his clients are his own. He acknowledged that he has ongoing work to do on his own “money scripts,” but that he is ready to take on the task of defining his own beliefs and values as a planner. What a wonderful service we were to him, by holding the space, not giving in to the temptation to address the *stated request*, but to listen and inquire about the meaning of the request itself and of a potential answer, for him. One of my favorite ways of responding to questions such as his is to ask, “*What would (finding a good book for clients) do for you?*” Essentially, we got there, through the classy listening and inquiring by the other OM callers, and the open listening and self-reflections of the person with the burning question.

**Resilience Retrospective:** With only ten minutes left, I posed a question, noting that we might have time to discuss only one person's response. Here's the background: we're almost a year into the economic downturn; truly The Year of Living Dangerously. I think it's a great time to inquire about what we're proud of, and what we've learned about our own resilience, in our response to this incredible series of events. So I asked this question:

*“Think back on the challenges you have faced since September, 2008, when the economic world began to implode. As you scan your ‘mental Rolodex,’ pick several challenges that you successfully met – however you define success – and that you feel good about. Replay one of these in your mind’s eye: your mental movie. Picture the situation, what was at stake, what you did, what others did, what resources (inner and outer) you called upon, how it turned out...and what you learned.”*

We had time for only one person to share, so I'll pose that question in upcoming Open Mics. The planner who offered his story described two situations in which a client (or couple) met with him, with the intent to terminate the relationship. (Each had a different reason, one saying he can “buy and hold” by himself, and the other, a couple, feeling they were not getting full value.) He described how he prepared himself for each meeting by defining success as “finding the best solution for them,” rather than as “keeping the client at all costs.” In each situation, he tried to understand their perspective, discussed their issues and their perceptions calmly, and reached a mutually satisfactory outcome which, in each case, was to continue the relationship. One instance involved clarifying the client's “mental math,” so he could understand the investment advice more clearly, which resolved the issue; in the other, he explained the nature of the services he had provided, what he is trying to do for and with the client, and point to areas where they have been successful. In each instance, he characterized the conversation as “genuine, heartfelt, and successful.” Asked what he has learned from these episodes, he said *“Don't assume you understand; take time to ask the right questions. And clients want to be heard. Don't be attached to outcome. My perspective is, ‘let's find a great solution – together.’”*

Thinking about it, that's exactly what we had done earlier in this OM hour; we took a request, heard the person out, understood him more deeply, and found a great solution – together. A real example of things coming full circle in the OM hour. (And the bonus; immediately after the hour, one of the participants met with his client for an annual renewal meeting, approached it with the intent to “find a great solution – together,” and did. As noted in the Highlights, it involved a non-renewal, with the intent to connect same time next year, and see what's what. Personally, I have no doubt that, in next year's conversation, the two of them will find a great solution – together.)

**Ed's Further Reflections: This Business of “Community.”** I've been thinking about the importance of “community” for each of us, including me. I'll introduce the topic today, and look forward to your sharing your own thoughts in response.

“Community” is different from “network,” the latter implying participating in order to get something, with no intent to reciprocate – except as needed in order to “get.” Being in community, by contrast, implies an intention to foster every member's well-being, including

one's own. I've heard it over and over this year, and I imagine you have, too: "*I couldn't have made it without the support of family, friends, colleagues... and clients.*" Personally, I cannot imagine a planner, or other service provider, being a self-contained island and surviving, to say nothing of flourishing, this year. Open Mic serves as one kind of community: a sort of mutual-support drop-in center for planners and others, around the world. I suspect that even those who don't participate in OM feel a part of this community, through the weekly recaps; reading these summaries seems to be a way of keeping in touch, continuing to learn from the wisdom of the people who call in that week, and feeling a little more connected and integrated, just knowing that Open Mic continues on. I, too, have reaped the benefits of community through Open Mic: the chance to convene a conversation among wonderful people; to learn through listening and 'conducting the choir' each week; to look forward to recapping the hour and distributing it to a thousand people; and hearing back from some of you. For all of that, I thank all of you.

In the next ten days, I will be part of two different communities of financial planners. One, a group of young planners called NexGen, is meeting in Moline, and I'll be co-facilitating and learning with and from them; I'm very excited at this opportunity to serve, commune, connect, and learn. (And no, I am not a NexGen member. Besides not being a financial planner, I was over their age limit when ... well, let's say a while ago.) Following the meeting's wrap-up, I get to facilitate a meeting of a study group of six NexGeners; yet another form of community. Then four days later, off to the Garrett Planning Network ([www.garrettnetwork.com](http://www.garrettnetwork.com)) Retreat in Kansas City. This is the third GPN Retreat for me. I'm looking forward to co-leading a World Café event, doing the Retreat wrap-up session with Sheryl Garrett, and conducting a post-Retreat workshop on resilience and happiness. It's worth the price of admission just to be in the presence of such genuine, skilled, committed, and *fun* people, and to feel the sense of community between them. I'm looking forward to hearing many stories of the "resilience retrospective" variety, hearing great presentations, and much sharing and laughter.

I'll have more to say about each event in the next "Further Reflections." Til then, I invite you to listen to the Beatles singing "*I Get By With a Little Help from My Friends*," and reflect on the ways in which that is true for you. (Probably better to listen to Ringo's version rather than Joe Cocker's; you'll understand the words better, and you won't feel wasted by the end.) If you're of a mind, email me and tell me about the communities that sustain and elevate you. I'd love to hear your stories.

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