

This Appreciative Hour©:
September 2, 2009 Open Mic Recap,
Plus More Reflections on Community: “Where Everybody Knows Your Name”

Highlights: Harvesting the Gems

*We spent a leisurely and surprisingly rich hour (“surprising” in view of the pace.). We did a one-minute centering practice (read the full story to find out why), and talked about what each person is especially grateful for this summer and what each is looking forward to as autumn inevitably approaches. Then, a planner was curious about how planners make the transition from having a practice to having a business, and the attendant challenges and obstacles. Participants put down their metaphorical glasses of lemonade, sat up in their hammocks, and shared the fruits of their experience. Read the full story below, plus my further musings on community. The link takes you to the Free Stuff section of my website, where you can click on **September 2 This Appreciative Hour**. While you’re there, you can download the prior recaps, and navigate through the rest of the website.*

OM Recap:

Centering Practice: I replicated a one-minute meditation practice I used several sessions ago, focusing on locating a calm, spacious area of one’s body, and seeing if we can expand that area til it occupies the entire body. My reason for offering a centering practice during this Open Mic was simple; I wasn’t feeling in the mood to offer a centering practice that day, and I sensed that going ahead with it anyway was better than giving in to my torpor; I intuited that if I didn’t, I would be withholding something of value, out of a temporary mood; I honored the resistance by acknowledging it, voicing it to the assembled group, and proceeding despite it. I’m glad I did; I think we benefited from it, and I learned the value of acknowledging a feeling state or mood but not allowing it to dictate my decision as to how to proceed.

“What’s been the high point of your summer?” People spoke of: an extended family vacation, made possible in part by a very supportive staff; a family reunion/wedding in So. Lake Tahoe, with the spouse’s health holding up and everyone having a wonderful time; sending off one’s youngest child to college in (get this...) Australia, to live out the youngster’s longtime dream of going to school there; a planner’s wife retiring from the school system after 30 years, and looking forward to more travel together, as well as a lower overall household stress level; a family reunion, centered upon the father’s 87th birthday, plus a one-week wilderness trip with the planner’s brother and brother-in-law. I offered my own gratitude for the magnificent Madison weather this summer, lending each day a magnificent sweetness and presence that can only happen (for me, anyway) when summer temperature, humidity, and mosquitoes are lower than usual. Like the expression says, everyone talks about the weather but no one does anything about it. Well, my wife and I are doing something about it; we’re *savoring* it! (*So: what was the high point of your summer?*)

“What Are You Looking Forward to, as Fall Approaches?” One planner’s looking forward to a Grand Teton trip for his brother’s 50th birthday (did I mention, the brother will be joining him?); another is energized about the strategic planning project that his firm has committed to; another planner’s firm has created, and will inaugurate, **“Pro Bono Tuesday,”** a once-monthly day in which she offers 90-minute planning appointments to people who don’t meet the criteria for (and aren’t necessarily interested in) a retainer relationship. Her delight is deepened by the staff’s excitement about helping a broader group of people; the finally-warm-weather delights another participant, whose California area has been unseasonably cool, and the warm front promises to stay a while (Note: her area has been spared the ravages of the dreadful fire conditions); and short vacations with his newly-retired wife is creating positive anticipation for another planner. Quite a range, wouldn’t you say?

Going from Having a Practice to Running a Business: A planner is writing an article on this topic, and wondered what attendees think of when they think of their practice as a business, and how they’ve dealt with that transition.

- One planner, who also teaches business planning, noted that it’s a huge transition. She coaches planners to create a business that doesn’t run the planner’s life: a mind-shift that she says not all planners successfully adopt.
- Another planner, whose firm has 20 employees and partners, recounted an almost-fifteen year intentional journey to a business that goes beyond the silo practice of several planners (which is the way it began); the firm’s planning staff devotes a full afternoon per week to working *on the business*, rather than working *in the business*. They have morphed as an enterprise, and have benefited from the dedicated weekly time; over time, they have created systems and processes that are not person-dependent, succession and career paths, salary and incentive compensation arrangements, etc. (Note: I have spent a day with this firm, in their fall retreat two years ago; they are the real deal.)

The planner who raised the issue wondered if “business” has a *dirty* connotation for some planners, whereas “practice” might connote a more positive value. The planner/business planning coach noted that for some planners in her experience, “profit” doesn’t feel quite right. But most want to control their lives and their futures, and have to learn some skills that are uncomfortable for them (that they didn’t have to exercise while in the employ of others), such as “asking for the sale.” She works with them to understand and incorporate what it takes to make the transition to a business. And finally, a planner who had joined us midway through (and whose presence I hadn’t detected) noted that she had learned a great deal, from some hard experience, about how to value her practice for sale and how to increase its value. The real gem was “the six-year time horizon,” consisting of the three years’ financial statements that a buyer expects, plus the three-year tie-in arrangement, whereby the seller is expected to stay and make a gradual transition. Clearly, if a planner takes seriously the mechanics of positioning the practice for sale, they’re into thinking of the practice as a business.

Ed's Further Reflections on Community: "Where Everybody Knows Your Name"

"Community" seems to be the key note of my summer. I've been writing and speaking about it, and being in community, throughout the summer. I'm feeling very privileged to be a part of numerous communities; my experience has given me some insights I'd like to share with you, about how to identify and target a community (or communities) that will both nourish and stretch you, and provide you the opportunity to give as well as receive.

The best guide to finding community can be found by asking yourself some appreciative questions, the answers to which can direct your search. The questions are variations on the theme of "**Who are My People?**" (I recall Charlie Weaver, the quaint old codger played by Cliff Arquette, who often visited the Johnny Carson Show. Whenever his ramblings were greeted by audience laughter – which was often – he would wait til the hilarity died down and exclaim, with exquisite comic timing, "**These are Myyyyyyyyyyyy People!**" which, of course, led to more laughter and applause.)



With that as the backdrop, I invite you to think about communities you're a part of, or have been a part of in the past, that have been important to you. See if these questions get at the essential qualities of your community, and its members.

- In whose company do I feel whole? competent? accepted and valued for who I am (rather than what I can do for the other person)?
- In whose company do I feel relaxed, at ease, and open (as opposed to "on alert" or diminished)?
- In whose company am I at my best: where my strengths, gifts, and talents are called forth in a natural way, and are appreciatively received?
- ...and where am I urged to stretch my current "best," to extend its reach... and am supported in that aspiration?

The above questions are about your personal comfort around people who might be or become part of your community. There is also a set of questions to ask about the qualities of those people, and your reactions to them:

- Do I like this person (or these persons)?
- Do I respect and admire what they're about: the path their lives are on?
- Do I identify with their strengths, gifts, aspirations?
- Do I feel like we are "equals"? (I know, that's a topic worthy of a separate conversation.)

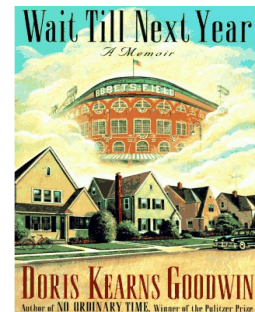
When we find someone(s) about whom we can answer these questions affirmatively, we should “grapple them to ourselves with hoops of steel.” (That’s a paraphrase of something I remember from reading *Hamlet* in English class in Midwood High School, a few years ago. Here’s what Polonius actually said to the Melancholy Dane: “*Those friends thou hast, and their adoption tried, Grapple them unto thy soul with hoops of steel.*”)

What to do next, when you identify your people? One possible step is to form an accountability partnership with them: a mutual-support-and-enhancement pairing, where each can act as cheerleader, peer coach, and friend. There’s a lot of talk these days about such pairings; sometimes people in the same field, sometimes in different ones. It’s worth exploring. I have a monthly conversation with two folks in Milwaukee, and I think we’re essentially becoming an accountability partnership.

Another way: if you find a bunch of kindred spirits who are also seeking community, you might establish a study group (think: accountability partnership, just larger). Successful study groups can last for years, with intact membership. People I know who have been part of such groups have great loyalty to the group and its members, and credit the group for their development as professionals and as people. Earlier this summer, I was privileged to facilitate the first in-person meeting of a group of six young financial planners, each of whom had known the other five and all of whom had decided they wanted to support each other’s paths. I found them to be inspiring as individuals; I’m convinced that as a group, they’re going to do great things with and for each other, and quite likely for the world.

One of my communities that I cherish deeply is the Nazrudin Project, a virtual community of financial planners and people like me, who serve them. Naz members share a passion for exploring a deep and broad view of what financial planning and financial planners, can be in (and for) the world. We meet once a year for what is generally a raucous, joyous, and stimulating couple of days. These meetings draw between 40 and 100 members (including newbies). One of the hallmarks of our meetings is *warmth and acceptance*; first-time attendees are strangers for about five minutes, and at the final go-round before the meeting ends, every newbie (100 percent of them) expresses gratitude for the reception they have been accorded. Another hallmark is *generosity*; there is much sharing of opinion and expertise, both at the meeting and on Naznet, our active listserve. I’ve been at all but one of the annual Naz meetings since joining in 1999, and I hope to make it to Rapid City next month. If so, I’ll look forward to embracing old friends, making new friendships, and being in a place where, like Cheers, everybody knows my name.

And if by chance I don’t make it to this year’s Nazrudin gathering ... well, I grew up in Brooklyn as a rabid (and therefore, often a heart-broken) Dodger fan, so I know the meaning of “Wait ’Til Next Year.”



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