

Client Blueprinting Guide

Mission





Mission

A mission statement is not simply a hokey statement that gets written once and then filed away. Rather, it is a living, breathing document that should be displayed prominently for visual reinforcement and should be internalized to keep your subconscious working on it. Spend time developing it, memorizing it, living it, and you'll be pleasantly surprised at the results.



Develop a Personal and Professional Mission Statement

Personal Mission Statement

Here's an example of a personal mission statement:

“My mission is to be loving and loyal to my family and friends, lead a successful career that I enjoy, stay healthy and take on any challenges that come my way.

I value my family, friends, spiritual fulfillment, sense of accomplishment and enthusiasm. I value my relationship with God and live by the Golden Rule.

Throughout my life, I will always be supportive and loyal to my family and friends. I will be an active member in my place of worship and in my local community. I will use my financial management skills to help needy organizations keep their financial houses in order.

I will live life to the fullest and strongly believe that nothing is impossible.”



Similar to a personal mission statement, make it personal, meaningful and inspirational. Both statements should be reasonably short and highly memorable. There's no set length to a mission statement. Just make sure you can remember it and it connects with you.

Your personal mission statement may follow a similar format or you may want to modify it. The key is to make it personal, meaningful and inspirational.

A personal mission statement is your declaration of the kind of person you want to be. It will serve as your lighthouse during difficult times and keep you motivated, focused and true during your life. Share it with your spouse or significant other. Think of it as a daily guide to living. Answer the following questions to help you create your personal mission statement.

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Who do I want to be?

How do I conduct myself?

What and who is important to me?

Directions:

Review your answers to the previous questions and then take some time to write a draft of your personal mission statement. The key is to get something down on paper. Let it percolate and then come back to it. Eventually, solidify and review it each day.

Personal Mission Statement

Professional Mission Statement

Your professional mission statement is your business guide. It can address such issues as who you are, why you exist, who you serve and what results your clients can expect. After you develop it, share it with your team and your clients. Let it permeate your office and guide you and your team.

Here are several examples of professional mission statements submitted by financial advisors:



To create a world of financial comfort by implementing custom solutions to individual needs!

We are dedicated to enhancing the quality of our clients' lives as we oversee their wealth to help them achieve their long-term goals and dreams.

To guide our clients through the process of obtaining financial peace of mind so they can focus on the most important things in life.

To guide our clients in making wise decisions based on Biblical principles for wealth management.

Similar to a personal mission statement, make it personal, meaningful and inspirational. Both statements should be reasonably short and highly memorable. There's no set length to a mission statement. Just make sure you can remember it and it connects with you.

In this exercise, you'll create a professional mission statement.

A professional mission statement is your declaration of the kind of career you want to have. Answer the following questions to help you create your professional mission statement. If you are an stakeholder, and not a business owner, write it from the perspective of how you do your job.

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What does my business offer that my target market needs and is willing to pay for?

How do I deliver my products and services in a way that is tangible and distinguishable from the competition?

Why do we exist?

What desirable outcome can my clients expect from working with me?

Directions:

Review your answers to the previous questions and then take some time to write a draft of your professional mission statement. The key is to get something down on paper. Let it simmer and then come back to it. Eventually, solidify and review it each day. Then share with your team to internalize and memorize.

Professional Mission Statement

Carson Coaching offers investment advisory services through CWM, LLC, an SEC Registered Investment Advisor. Carson Coaching and CWM, LLC are separate but affiliated companies and wholly-owned subsidiaries of Carson Group Holdings, LLC. Carson Coaching does not provide advisory services.



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