

Client Blueprinting Guide

Vision



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There's an old saying, "If you don't know where you're going, any road will get you there." That's a recipe for mediocrity. People of great achievement know exactly where they're going, and they take the necessary steps to get there. Where is "there" for you?

"There" is your ideal future scenario. This is the dream life and dream business you would create if you had absolutely no constraints and could simply wave a magic wand and make it happen. It's your vision for your environmental surroundings, the people you associate with, what you spend your time doing and what you want to accomplish. It's different for everybody. For example, perhaps you want to be successfully self-employed, working from home and living in the mountains. Or, perhaps you want to work for a non-profit organization that speaks to your heart and live near your children and grandchildren. It can be anything, but it must be something, and it must be clearly defined. It must include tangibles so you can see it, feel it, touch it, smell it and hear it so you can get all your senses involved in helping you drive toward it.

Your vision must be compelling. It must be something that motivates you to jump out of bed in the morning and get working. Your vision is what will sustain you when you face major obstacles. To develop it, disengage from the present and position yourself in a future with unlimited possibilities. Eliminate your limiting beliefs and think big. With this frame of mind, you can develop a vision that propels you to success and happiness far beyond what you've ever imagined.



Create a Compelling Vision of Your Future

The key to your compelling vision is to create one that motivates you to take action and helps you persevere even when times are difficult. Here's an example of a compelling vision of the future:

I enthusiastically jump out of bed every morning full of love for God, family, friends and life. I am a husband my wife is proud of, a father my children look up to and a friend people count on.

My family is financially secure, physically fit and emotionally close. We live in a comfortable home on one acre with a postcard-perfect view of the Pacific Ocean. Our home is light and airy with crisp ocean breezes blowing through. Pictures of my family and special moments in our life line the walls. The sound of grandchildren fills the house. As I look out the window, I see waves lapping the shore, seals playing on the rocks and surfers hanging ten.

My days are spent helping the people around me reach their fullest potential. I do this by meeting with my top clients, guiding them in reaching their dreams and aspirations, and communicating my wisdom through my life-planning website. My financial success enables me to be a reverse tither, and I give away 90% of my income and live on 10%. My schedule is flexible and I spend several hours a week mentoring disadvantaged children. For recreation, my wife and I travel the world, visit our kids and grandkids, read and take time to enjoy the beauty of the great outdoors.

When I go to bed at night, I sleep soundly knowing I helped make the world a little better than it was when I woke up.

In this exercise, you'll paint a picture of your compelling vision.

Directions:

Don't hold back. Finish each statement as accurately and completely as possible. This is your future, so make it a great one!

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I want people to remember me by saying I was...

If I had all the money I ever needed, I would spend the rest of my life...

If I wasn't so afraid, I would...

Review how you finished all the previous statements. From this, use the following outline to write a compelling vision that motivates you to take action and gives you great excitement from just thinking about it.

Relationships I surround myself with...

Environment I live and work in....

I spend my days working on...

Away from the office, I...

I'll be remembered for...

Create a Vision Statement

Now that you have a compelling vision for your future, it's time to simplify this information to share with your team by creating a professional vision statement. A professional vision statement answers the question, "Where do I see my business in the near future?"

In the space provided below, create a professional vision statement that is succinct, motivational and provides clarity for your team about where you are going.

Professional Vision 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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