

# Blueprinting

This course is designed to help you identify your personal values, discover your personal and professional purpose, create a clear picture of the vision for your life and your business, develop a personal and professional mission statement, clearly articulate your value proposition to target clients, and set meaningful short-term and long-term goals.

## Overview:

In order to develop a strategy that gets you where you want to go, first we have to know where it is you're *going*. In this lesson, we'll share a proven methodology we've used with thousands of advisors over the past two decades to help you regain your focus and re-ignite your burning desire to plot a purposeful path forward. It's an exercise we like to call Blueprinting your business. The Blueprinting Process clears your mind of the noise – which can wreak havoc on our attention spans—and provides you with a framework on how to build a business that is focused and effective.

For those of you who either feel like you've covered this already or think it's "too soft" for you, think again. Blueprinting is a **foundation** upon which everything else in your business and life is built. Ron Carson has gone through the Blueprinting Process more than a dozen times in the last 20 years to re-center his priorities, refine the company's vision and, perhaps most importantly, remind himself of what is most important personally and professionally. Without moving through this mindful reflection, you can't effectively lead your firm into the future. You owe it to your business as much as you owe it to yourself.

## The six steps of the Blueprinting process are:

- **Step 1:** Values
- **Step 2:** Purpose
- **Step 3:** Vision
- **Step 4:** Mission
- **Step 5:** Value Proposition
- **Step 6:** Goals

To get started, identify a space other than the office where you can remove yourself from distraction. It should be a place that feeds you and ignites the creative corners of your brain. Attempting to work "on" the business while you're "in" the business doesn't give your mind the focus it needs to map out a big picture. Whether it's your favorite coffeehouse, the lake house, or a favorite bed and breakfast, sequester yourself off-site and in the quiet.

**Coach Tip:** Blueprinting doesn't have to be an ultra-marathon session during which you are hit by a great force of inspiration and emerge days later an enlightened version of yourself. You can work on it one piece at a time—perhaps during weekends or Friday afternoons—allowing room for reflection. And don't think you have to do this all on your own; consider partnering with someone else who will hold you accountable—a partner, a best friend, a coach, a pastor, a peer or a mentor. Not only can they help you stay committed to the task, talking with someone else often reveals issues and ideas that we ourselves

might not necessarily notice on our own—a change of tone in our voices, energy level and other nuances that can hint at something significant.

Now let's dive in and start designing the business and life that make you excited to jump out of bed each morning.

## Step 1: Identify Your Personal Values

Before you can discover your purpose in life, you must first know what is most important to you. These values include such aspects in life as family, health, career, and spirituality. Once you have identified the things you value, review them. Remember, having strong convictions about what you value, and keeping them front and center in your life, keeps you balanced and focused on the most important things.

Here are some examples of values that may help you think of your own:

- Love
- Relationships
- Adventure
- Family
- Faith
- Career
- Fun
- Happiness
- Simplicity
- Honesty
- Financial Security
- Health
- Friendship
- Authenticity
- Autonomy
- Balance
- Kindness
- Curiosity
- Respect
- Service

Do a quick internet search for “personal values examples” for more. Start by making a list of at least six values that are core to who you are. Remember, this is a personal exercise – there is no right or wrong. Once this is done, indicate the percentage of time you spend supporting these values in your life today. Review this list and take time to really think about the values you wrote down. Ask yourself, “Am I spending the time I should be living these values?” If you’re not, use the second table in the **Blueprinting** workbook exercise to fill in your values along with what you can do that will help you integrate this value more fully into your life.

It's time to dive in! Use our Blueprinting workbook, identify and rank the things you value most in your life, and once finished, move on to the second step in the Blueprinting Process: Finding Your Meaningful Purpose.

## Step 2: Find Your Meaningful Purpose

*“The two most important days in our lives are the day we were born and the day we discover why.” – Mark Twain*

Too many of us simply go through the motions of daily life, hoping to arrive at death safely. It’s no way to live. We wake up, trudge through our workday, frantically fight fires, come home, eat, maybe spend a little time with families, and then right back to bed so we can do it all over again the next day. It’s a deadly rhythm that often catches us by surprise when we look back on years, or even decades, and are disappointed by how much time we spent accomplishing so little.

So, how do we avoid falling into this trap? We dig deep and uncover the things that excite us, drive us and refresh us. To do this means taking an honest look at our life and identifying the cause that forces us to jump out of bed in the morning. This purpose or cause isn’t about chasing a feeling that could come and go. It’s about finding a fundamental truth that fulfills you through the crests and troughs of life.

We all have certain desires and pursuits in life, but when we move beyond the day-to-day chase, what moves you?

This is the first of several questions you'll need to answer for yourself when moving through this exercise. Without a meaningful purpose, we simply go through the motions of daily life. And if we continue on this path, more than likely, a time will come when we look back to reflect on what we've accomplished...and then we'll realize how little we did.

Questions to ask yourself to discover your purpose are:

- Are you committed to finding your meaningful purpose in life, and if so, what has happened that now makes you ready?
- What are your unique gifts and what do you do extremely well?
- What do you value most in life?
- What activities and social issues are you most passionate about?
- When you feel empty and directionless, what is missing in your life during these times?
- How are you nourishing your soul spiritually?
- How do you go about making an important decision about the direction of your life?

- What causes will I fight for?
- What am I most passionate about?
- What do I turn to when life gets overwhelming and complicated?
- What things feed a great feeling of satisfaction and fulfillment?
- In what moments do you feel you are living your purpose?
- How will others (or the world) be better as a result of my actions?

As you move through each of these questions, take time to jot down your thoughts and reflect. Make some notes, then set them aside for awhile. The answers may not come to you right away. After a week or two, revisit what you wrote, and if the answers still feel right, continue the process until you discover your "aha" moment. That's when you know you've got it right.

**COACH TIP:** There are two important keys to remember when working through the Purpose section of Blueprinting. First, you may want to define two "purposes" for your life: a "personal purpose" and a "professional purpose." For some people they intertwine, but not always. Second, the purpose you define during the process is not set in stone for the rest of your life, so don't let that hold you back! This is your purpose *for now*. Your purpose will likely evolve as the world changes, you gain new perspectives, and life events happen.

So, let's get started. Use the Blueprinting workbook and answer as many of the questions as you can. This period of reflection is very important, so take your time. After you've found your purpose, we'll see you back here for the next step in the Blueprinting Process: Creating a Compelling Vision for Your Future.

### **Check Your Understanding:**

At Carson, we're big fans of Simon Sinek's book "Start with WHY." To get inspired to find your purpose, take 20 minutes to watch his TEDx Talk "[How Great Leaders Inspire Action.](#)"

## **Step 3: Create a Compelling Vision for Your Future**

As you reflect on your newly-drafted purpose, whether it be a sentence or a paragraph, ponder where this road leads you. This ideal end-of-the-road scenario is the dream life or dream business you desire to if you had absolutely no constraints. Describe the people who surround you, the setting you're in, the things you see. Include the tangible details that engage all your senses so you can feel it, hear it, touch it, smell it, and engulf yourself in it. It must be so compelling that it stirs you up inside. It sustains you through painstaking obstacles and motivates you every second of the day.

Disengage from the present and place yourself in that ideal future. Finish a few of these lines in detail, describing as much as you possibly can:

- 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...

- I would love to spend my days working on...
- Relationships I want to surround myself with...

More of these kick-starter statements can be found in the [Blueprinting Guide](#). When writing your vision, get clear. Get specific! Really paint a picture for what you want your life and your business to look like in 10-15 years. Don't just say you have a "thriving" business – describe what that looks like!

Once you have your vision outlined, think about how to condense it to share with your team. This simplified professional vision statement will answer the question, "Where do I see our business in the near future?"

**COACH TIP:** When painting the vision for your team, make sure it's a vision that gets **THEM** excited about their future. You may be looking forward to long weekends at the lake and buying a new boat, but your team wants to know what's in it for them. How does the vision support **THEIR** passions and personal growth? How does it make their lives meaningful? This is the information and detail your team needs to feel they are marching towards something significant.

Again, take time to reflect on the professional vision you've painted before making it "semi-final" or sharing it with your team. Is this vision really something that makes you excited? Will it keep you going, even on the difficult days? Can it act as a filter for opportunities that might present themselves? Share your vision with a trusted coach, friend, or mentor. Can they "picture" it? If not, you have work to do before sharing it with your team.

Get started by working through the Vision section of our [Blueprinting Guide](#) and sharing it with your coach or mentor. Then we'll see you back here for the fourth step in our [Blueprinting Process](#): Developing a Personal and Professional Mission Statement.

## Step 4: Develop a Personal and Professional Mission Statement

A mission statement takes your core values and your vision and translates them into action. Your personal mission statement declares the type of person you want to be and how you will conduct yourself. 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."*

Your professional mission statement is your business guide -- the rally cry you instill in your team. This mission statement carries over into the workplace, so clients understand what you value, what you stand for, and how you deliver on those core values. Why do you exist? How are you set apart from the advisor team down the road? How do you deliver that distinguished value in a tangible way? What outcome are you hoping to help your clients pursue? These answers become the key components to your professional mission statement. Here are a few examples of professional mission statements:

*“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 security so they can focus on the most important things in life.”*

Use the “Mission” section of the Blueprinting workbook to define your personal and professional mission statements, then move on to the next section of our Blueprinting Process: Expressing Your Value.

## Step 5: Express Your Value

The next step in the Blueprinting process is to distill your mission statements down to a simple value proposition that encompasses what you deliver to their clients. In other words, put yourself in your client’s shoes and answer the question, “What’s in it for me?” This is an absolutely critical step, because a key part of your growth is having a really impactful message and being able to communicate it so *well* that client tell your story for you.

Choose keywords from your personal and professional mission statements and expand on how each of those keywords bleeds into the experience your clients receive. The more descriptive you are, the more clarity you’ll have to work with in creating a compelling value proposition.

A value proposition should answer two questions:

1. Why should I do business with you?
2. What will my experience be like working with you?

**COACH TIP:** Successful advisors know that they sell **OUTCOMES**. Your value proposition to clients is not that you deliver a comprehensive financial plan, but what that plan does for your client: it gives them peace of mind, helps them feel confident about their future, allows them to spend time with the people who are important to them, etc. Your value proposition should have an emotional element – because that’s what’s going to resonate with your clients. Remember, humans tend to make decisions based on emotion, not logic!

Use the Blueprinting workbook to begin brainstorming about your value proposition. It can also be a great idea to check in with your Advisory Council and your best clients. What made them choose to work with you? When they talk about your firm and how you help them, how do they describe you? In their minds, how do you stand out from all of the other advisors in the world?

Take all of the information you gather from your brainstorm and client interviews and boil it down to a simple statement. Then share it with your coach or, if you don’t have a coach, someone else who talks to a good number of financial advisors on a regular basis. You want someone to push you to refine your message to a concise, powerful value proposition that is unique to you and your firm.

Take action now by working through the “Value Proposition” section of the Blueprinting Guide, then move on to the next step of the process: Setting Short and Long-Term Goals.

### Check Your Understanding:

*What are some of the emotions your clients tell you they feel after they've gone through your wealth management process? (Rank these, circle relevant ones, and/or add your own.)*

- Confidence
- Relief
- Peace of mind
- Excitement
- Gratitude
- Hopeful
- Pride
- Inspired
- Motivated
- Calm
- Joyful
- Optimism
- Happy
- Content
- Eager
- Clarity

### Step 6: Set Short & Long-Term Goals

We all have wants and desires. We all daydream about what it would be like to be living our ideal life. But, merely thinking about our ideal life will not get us our ideal life. We have to be clear about what we want, when we want it, why we want it **and** we have to take positive action to make it happen. The goal-setting process is critical to making all this happen.

For many advisors, setting goals is still all about the numbers:

*"In ten years, I want to hit \$500 million in assets under management, with a team of 15 and two months of vacation with the family."*

OR

*"I want to grow revenue by 15% this year and hire an Operations Manager. Oh, and I want to lose 20 pounds."*



Several firms and advisors still take a rather cursory approach to goalsetting—and the rest tend to limit themselves before they even begin by not reaching far enough. It's easy to fall back on the traditional “needle movers” like revenue, assets under management (AUM) or number of clients. And, while these are perfectly valid measures of business success, they're uncontrollable to a large extent.

Some may disagree, but, at Carson, we see “goal control” as a zero-sum game. You either have it fully or you don't. Your goals are either totally controlled by your activities—or they're not. This is an important distinction our coaches often make when discussing goal planning: *There's a difference between outcome-based goals and activity-based goals.*

While the nature of our profession often measures success through AUM or revenue, outcome-based goals like this need to be counterbalanced with actionable, measurable and controllable goals. For instance, you might have an activity-based goal to release a new piece of technology that your team is developing. You might have a goal to add two new positions to your team. You might want to fully convert from one CRM to another by year-end. You might have an activity-based sales goal to hold four prospecting events.

These are not only important, perfectly legitimate goals, they're also under your control. Your effort, energy and time will determine if they are accomplished or not.

They may not have the sizzle of outcome-based goals—income, revenue and the like—but they're controllable, measurable and can, in fact, move the firm forward in a meaningful way...toward those outcome-based goals! Leading with activity-based goals allows you to focus your efforts, better determine capacity (for the sake of your team's sanity) and make smarter judgements on where to place your energy and time.

**COACH TIP:** Have an aversion to the term “goal”? No problem. For some people the word has a negative connotation, and we get that. Instead of goal-setting, ask yourself questions like “What needs to happen over the next few years for me to get where I want to go?” or “What would make this an amazing year for our business?” Once refined and put through the SMAC filter, your answers become strategic initiatives and priorities for the year, and your team can start to develop a plan to accomplish them. The important thing is that you are intentional about moving your business forward.

For best results, make sure your goals are also SMAC-certified -- Specific, Measurable, Achievable and Compatible.

S—Specific. Have we defined a clear start date and deadline?

M—Measurable. Have we assigned KPIs to measure progress?

A—Attainable. Is the goal reachable and do we have the resources?

C—Compatible. Is this goal in congruence with our values and vision?

Most of us have heard of the first three, but “Compatible” may be a new element for you.

At Carson, we believe it's absolutely critical that all of your goals are compatible with your values and vision. Setting goals that aren't compatible with what is important *to you* is a recipe for unhappiness and living an unfulfilling life.

Use the Blueprinting workbook to begin setting your long-term and short-term goals. Begin with your vision and work backward: *To pursue your vision, what has to happen in 10 years, 5 years, 3 years and 1 year?*



Determine the age you, your significant other, and any children will be at each of those time periods. Identify the goal, then determine the activities that will have the greatest impact on reaching that goal. Finally, for short-term goals, identify the reward you will get by reaching the goal.

Checklist for successful goal setting:

- Have a balance of outcome-based and activity-based goals
- Make sure goals are SMAC-certified
- Set both long-term and short-term goals
- Involve your team! What gets them excited?
- Ensure goals tie to your long-term vision
- Review goals quarterly, and revise as needed

This is the fun part where we start taking your vision and making it a reality, so let's get started! Begin defining your goals using the "Goals" section of the Blueprinting Guide.

### **Check Your Understanding:**

In what areas of your life do you want to make sure you set goals? (Check all boxes that apply)

#### Personal

- Physical health
- Mental/emotional health
- Play/leisure
- Family
- Spirituality
- Community Service
- Friends/Social
- Financial
- Education
- Environment (House, car, etc.)
- Significant Relationship
- Career/business

#### Business

- Financial Management
- Financial Growth
- Team
- Strategy
- Leadership
- Service Offerings/Expertise
- Client Experience
- Operational Efficiency
- Marketing
- Sales

- Business Management
- Time Management

## Summary:

*"I consider it a dangerous misconception of mental hygiene to assume that what man needs in the first place is equilibrium or, as it is called in biology, 'homeostasis'— i.e., a tensionless state. What man actually needs is not a tensionless state but rather the striving and struggling for a worthwhile goal, a freely chosen task. What he needs is not the discharge of tension at any cost but the call of a potential meaning waiting to be fulfilled by him." – Viktor Frankl, Holocaust survivor and author of *Man's Search for Meaning**

Only by living our life by design can we find ourselves in a place we are meant to be. Too many people wander aimlessly to a destination as foreign to them as the path itself. That's no way to make the most of this one incredible life we've been given. Pay attention to what inspires and speaks to you. Believe in the areas where you have unique talents. Find the place where those abilities meet a significant need in this world.

Blueprinting is a simple process, but it's not easy, and it's far from "soft." Blueprinting is about being intentional about the life we live.

Values. Purpose. Vision. Mission. Value Proposition. Goals.

Push yourself to really take the time and dig deep on this process. **If you embrace Blueprinting and why you come to work, it makes other things so much easier.** And don't forget—Blueprinting isn't a "once and done" process. It's important you revisit the process often, whether for a quick revision or an overhaul after a major life event. It's time you give yourself permission to pursue your purpose.

## FAQs:

- **How often should I go through the Blueprinting process?**
  - Carson coaches generally recommend reviewing and revising your Blueprinting on an annual basis, and going through a more comprehensive overhaul every 3-5 years, or any time you have a major life event like a marriage, divorce, birth, death, illness, or professional change. Of course, if you ever feel it's time for a check-up, do so! Don't wait because it's not the "prescribed" time.
- **I'm not the sole owner of my business; it's a partnership. How do we effectively complete the Blueprinting process?**
  - A great way to approach the process is to have each partner complete the Blueprinting exercises individually, and then share with each other. Next, create joint versions of the company's Values, Purpose, Vision, Mission Statement, Value Proposition, and Goals. If you find there's a wide gap between how partners see these areas, bring it up with your coach so that they can help you effectively navigate the differences and achieve alignment between partners.
- **I'm not a partner in the business; how should I look at Blueprinting?**

- Blueprinting is still an incredibly important process, even if you're not a firm owner. Go through the same process, but keep in mind important pieces like your firm's value proposition and mission statement. If you're working at a solid financial planning and wealth management firm, you should be able to include some of those elements in your value proposition statement as well. If you find misalignment in areas like values, purpose, vision and mission, it may time to reassess your role, the firm you're with, or have a conversation with firm owners about how you be a leader in helping the business grow and evolve in the future.

## Resources:

Learn more and download the resources referenced in this document from the [Blueprinting](#) course in Carson Coaching Online.

- **Blueprinting Guide**