SMART BUSINESS THINKING AT HOME

PARTICIPANT PACK FOR WORKSHOPS 1, 2, 3, 4 & 5

PARTICIPANTS: DATE:

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Summary of Exercises

Workshop 1: The Big Picture - Vision, Mission, Values

- Exercise 1: Vision Worksheet
- Exercise 2: Vision, Mission, & Values Statements
- Debrief for Workshop 1

Workshop 2: The Big Picture - Strategic Plan

- Exercise 3: 5-Year Strategic Plan
- Debrief Workshop 2

Workshop 3: The Nitty Gritty - Annual Priorities

- Exercise 4: Key Priorities for the Year Ahead
- Debrief Workshop 3

Workshop 4: The Nitty Gritty - Annual Operating Plan

- Exercise 5: Annual Plan - High level
- Debrief Workshop 4

Workshop 5 : Decision Radar & Roles

- Exercise 6: Decision Radar
- Exercise 7: Decision Roles
- Debrief for Workshop 5

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E-WORKSHOP 1
VISION, MISSION, VALUES

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By the end of Workshop 1...

1. You will have a big picture view of **"What you want out of life and your life together"** with a comprehensive and structured approach to fast-forwarding through your years ahead

2. You will have articulated your **"Family Culture"** through your joint family Vision, Mission, and Values statements

3. You will have captured benefits from reapplying **Smart Business Thinking at Home** and completed 1 of the 5 Workshops.

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Summary of Exercises - Workshop 1

Workshop 1: Vision, Mission, and Values

Exercise 1: Vision Worksheet	**20 minutes**
Exercise 2: Vision, Mission, & Values Statements	**15 minutes**
Debrief for Workshop 1: Capturing Next Steps	**5 minutes**

Note: timings are for creating an initial draft and having focussed conversations during the workshop. Please feel free to revisit each of these in more detail.

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20 minutes Choose 1-2 categories to focus on here

Exercise 1: Drafting your Vision Worksheet (1)

Vision Worksheet for _____

		Where are We Today (2013)	+5 Years (2018)	+10 Years (2023)	+ 20 Years (2033)	+30 Years (2043)
Age Benchmarks:	Self/Spouse					
	Kids					
	Parents					
	Other					
GOALS	Spouse 1					
	Spouse 2					
	Couple					
	Family / Kids					
	Parents					
	Friends					

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Exercise 1: Drafting your Vision Worksheet (2)

		Where are We Today (2013)	+5 Years (2018)	+10 Years (2023)	+ 20 Years (2033)	+30 Years (2043)
Age Benchmarks:	Self/Spouse					
	Kids					
	Parents					
	Other					
	Career					
	Primary Residence & Property					
	Kids Education					
	Health & Personal Development					
	Travel / Entertainment / Visitors					
	Charity / Community Service					
	Financial Net Worth					
	Other					

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15 minutes Start by drafting your Values

Exercise 2: Drafting your Vision, Mission, and Values Statements

1

Vision

Consider :

- *Where do you want to be 5, 10, 20 years from now ?*
- *What do you want your family's "legacy" to be - what do you want to be remembered for? What do you hope for your children?*

2

Mission

Consider :

- *"What" and "How"... What is your purpose as a family? How do you like to achieve it?*
- *What makes your family unique and special?*

3

Values

Consider :

- *What are your beliefs? What is important to you and your family?*
- *How can these beliefs and principles help to guide your decisions?*

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15 minutes Start by drafting your Values

Exercise 2: Drafting your Vision, Mission, and Values Statements

1 **Vision**

2 **Mission**

3 **Values**

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5 minutes

Debrief Workshop 1: Vision, Mission, Values

a) Discuss: How did you find these exercises?

b) Capture your key Next Steps, any areas that require further discussion, and when you will revisit them:

-
-
-
-

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Workshop 1: “Parking Lot” or Other Follow-up Thoughts

Congratulations on completing Workshop 1!

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E-WORKSHOP 2
STRATEGIC PLAN

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By the end of Workshop 2...

1. You will have discussed a **joint Big Picture view** by considering various elements across your family life in the context of your Family Vision, Mission, and Values.

2. You will have drafted your **"5-year Strategic plan"** including Where you are today, Where you want to get to in 5 years, and How to get there.

3. You will have captured benefits from reapplying **Smart Business Thinking at Home** and completed 2 of the 5 Workshops.

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Summary of Exercises - Workshop 2

Workshop 2: The Big Picture : 5-Year Strategic Plan

Exercise 3 : 5-Year Strategic Plan	**20 minutes**
Debrief for Workshop 2: Capturing Next Steps	**5 minutes**

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20 minutes For 2-3 categories

Exercise 3: Drafting your Family 5-Year Strategic Plan

2013 2018

WHERE ARE WE TODAY?	→	WHERE DO WE WANT TO GET TO?	→	HOW ARE WE GOING TO GET THERE?

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20 minutes For 2-3 categories

Exercise 3: Drafting your Family 5-Year Strategic Plan

2013 2018

WHERE ARE WE TODAY? → **WHERE DO WE WANT TO GET TO?** → **HOW ARE WE GOING TO GET THERE?**

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Exercise 3 Supplement : Some categories to consider

- Property & Finance
- Family
- Health & Personal Development
- Career
- Travel & Visitors
- Others

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5 minutes

Debrief Workshop 2 : 5-Year Strategic Plan

a) Discuss: How did you find these exercises?

b) Capture your key next steps and any areas that require further discussion:

-
-
-

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Workshop 2: “Parking Lot” or Other Follow-up Thoughts

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E-WORKSHOP 3
ANNUAL PRIORITIES

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By the end of Workshop 3 ...

1. You will have identified your **joint Top 3 to 5 Annual Priorities** for the year ahead.

2. You will have a **better appreciation of your spouse's perspective** - by understanding their initial priorities and where and why they may tend to differ from yours.

3. You will have captured benefits from reapplying **Smart Business Thinking at Home** and completed 3 of the 5 Workshops.

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Summary of Exercises - Workshop 3

Workshop 3: Key Annual Priorities (The Nitty Gritty)

Exercise 4: Key priorities for the Year Ahead	**25 minutes**
Debrief for Workshop 3: Capturing Next Steps	**5 minutes**

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25 minutes

Exercise 4: Drafting your Key priorities for the year ahead

1. **Identify possible agenda items - Individually, first**

Create your individual "long lists" separately.

10 minutes

2. **Share and discuss your list of potentials.**

Create your joint "long" list and understand why each item is important.

Agree a prioritisation process and/or have a robust discussion to narrow them down.

3. **Agree Top 3-5 items for the year ahead.**

Agree no more than 5 Key Priorities for the year ahead.

Write them down and practice keeping them top of mind. These should guide your decision-making and help prioritisation.

15 minutes

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10 minutes

Exercise 4 (Part 1): Drafting your Key priorities - Individual “long lists” for the year ahead

For Spouse A:

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-
-
-
-
-
-
-

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Exercise 4 (Part 1): Drafting your Key priorities - Individual “long lists” for the year ahead

For Spouse B:

-
-
-
-
-
-
-
-

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15 minutes

Exercise 4 (Part 2): Joint Top 3-5 Priorities for the year ahead

1.

2.

3.

4.

5.

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5 minutes

Debrief Workshop 3 : Key Annual Priorities

a) Discuss: How did you find these exercises?

b) Capture your key next steps and any areas that require further discussion:

-
-
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Workshop 3: “Parking Lot” or Other Follow-up Thoughts

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E-WORKSHOP 4
ANNUAL OPERATING PLAN

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By the end of Workshop 4...

1. You will have drafted your **joint Operating Plan** for the year ahead.

2. You will have **c.60 key activities for the year ahead agreed - phased by quarter**, and will have taken a broad view of important categories in your life.

3. You will have captured benefits from applying **Smart Business Thinking at Home** and completed 4 of the 5 Workshops.

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Summary of Exercises - Workshop 4

Workshop 4: Annual Operating Plan (The Nitty Gritty)

Exercise 5: Annual Plan - High level **20 minutes**

Debrief for Workshop 4: Capturing Next Steps **5 minutes**

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20 minutes

Exercise 5: Drafting your Annual Plan - High level

1. **Select and/or Create relevant categories for your Annual Plan**

Choose from suggested categories or create your own

2. **Fill in upcoming activities by Quarter for the year ahead**

"Brain dump" the various key activities in both your minds and then work together to complete a common picture of the year ahead.

Start with 1-3 activities per category per quarter at a high-level

3. **Agree an update and review process.**

Agree where you want to take it from here.

ie. monthly or quarterly reviews,
who will update the plan,
if you want more a more detailed monthly plan

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20 minutes

Exercise 5: Drafting your Annual Operating Plan - High level

(1-3 activities/ quarter/category)	**JFM** (Jan, Feb, Mar)	**AMJ**	**JAS**	**OND**
Property & Finance				
Individuals & Family				
Health & Personal Development				
Career & Volunteer				
Travel, Visitors & Entertainment				

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Exercise 5: Drafting your Annual Operating Plan - High level

(1-3 activities/ quarter/category)	**JFM** (Jan, Feb, Mar)	**AMJ**	**JAS**	**OND**

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5 minutes

Debrief Workshop 4 : Annual Operating Plan

a) Discuss: How did you find these exercises?

b) Capture your key next steps and any areas that require further discussion:

-
-
-

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Workshop 4: “Parking Lot” or Other Follow-up Thoughts

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E-WORKSHOP 5
DECISION RADAR & ROLES

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By the end of Workshop 5...

1. You will have applied “science” to your home decisions and will have defined your **joint Decision Radar** by considering “what” your key upcoming decisions are.

2. You will have defined your **Decision Roles** and decided “who” needs to be involved in key decisions using the “RIDDE™” framework.

3. You will have captured benefits from reapplying **Smart Business Thinking at Home** and completed all 5 of the 5 Workshops.

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Summary of Exercises - Workshop 5

Workshop 5: Decision Radar & Roles

Exercise 6: Decision Radar **20 minutes**

Exercise 7: Decision Roles **15 minutes**

Debrief for Workshop 5: Capturing Next Steps

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20 minutes

Exercise 6: Creating your Decision Radar

DECISION RADAR

1 **Create long list of upcoming decisions in the next 12-18months**

15 min.

Ensure that the list captures both your views.

2 **Prioritise by Importance**

5 min.

Prioritise the list and agree which decisions need to be evaluated more robustly

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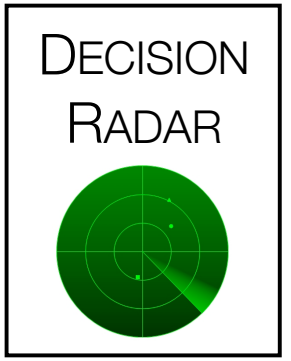
15 minutes For Creating

Exercise 6A: Creating your Decision Radar



Upcoming Decisions to be made in the next 12-18months

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5 minutes For Prioritising

Exercise 6B: Prioritising your Decision Radar

DECISION RADAR

Family (12-18 months)

1.

2.

3.

4.

5.

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15 minutes

Exercise 7: Exploring Decision Roles using *RIDDE™*

R
Recommend

I
Input

DD
DDecide

E
Execute

RIDDE™

1 **Evaluate a past decision process**

Use the "*RIDDE™*" framework to evaluate a recent decision process

2 **Select a future decision to evaluate**

Select a future decision from your Decision Radar to evaluate using "*RIDDE™*"

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15 minutes

Exercise 7: Exploring Decision Roles using *RIDDE™*

Past Decision Example

Decision:

_____

_____

_____

_____

1. Recommend:
2. Input:
3. DDecide
4. Execute:

Future Decision (from Decision Radar)

Decision:

_____

_____

_____

_____

1. Recommend:
2. Input:
3. DDecide:
4. Execute:

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5 minutes

Debrief Workshop 5 : Decision Radar & Roles

a) Discuss: How did you find these exercises?

b) Capture your key next steps and any areas that require further discussion:

-
-
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Workshop 5: “Parking Lot” or Other Follow-up Thoughts

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