

## RETREAT THREE

# SPIRITUAL BUSINESS PLANNING

**Objectives:** The goal of the third retreat is to give group members a tool for building on their Personal Life Mission statement and for building a practical action plan for directing daily life toward this mission. Here, we use the framework of a business plan to take a more entrepreneurial approach to our spiritual life and purpose. The group is also encouraged to “coach” one another to sharpen each group member’s approach to leading the life that they most want.

**Preparation:** This retreat builds upon our earlier meeting about “Building a Life Mission.” Participants are encouraged to come prepared with Life Mission statements from this previous session, which will be used as the foundation for the weekend retreat. It is ideal to prepare “binders” with tabs for each participant in advance of the retreat, so participants can follow along and construct their own personal plans in an organized way. The binder might consist of tabs for: Overview, Life Mission, Unique Values, Personal Definition, Environments, Competition, Team, Go To Market, Balance Sheet, Goals, Strategies and Action Plan. Each section of the binder should have 3-4 blank pieces of paper. Place Addendum A chart at the front section called Overview. In addition, we recommend bringing the following: a Bible (for readings), background music, diaries, and writing implements for each member.

**Agenda:** The following 1.5 day agenda is provided for your inspiration. As with all our sessions, feel free to adapt and modify to the particular needs of your group. For additional materials, we welcome you to our website at [www.faithbalance.com](http://www.faithbalance.com) to view sample prayers Scriptural references, and to share your own ideas and experiences for other men’s faith groups.

### Day One: “Taking Stock of the Real Me”

**Opening Prayer:** *Lord, thank you for the giving this group of men the opportunity to gather in your name, learn more about ourselves, and celebrate our relationship with you. We acknowledge that you are the source of all our lives – you look over us as a shepherd, help us through our struggles and our victories in life, guide us on our path. We seek knowledge about our own journeys – our own life plans-- so that we may better serve you as your faithful servants. In your name we pray, Jesus. Amen.*

**Group Warm-up:** (25 min - purpose: get to know one another better) Five group members are asked on the fly to create an “elevator pitch” for an ordinary object that they find in the room (such as a paper clip, brush, shirt, etc). The pitch is an attempt to get \$1M for funding production of the item for some special use. Each member should explain (a) what the item is, (b) why it’s important for some group to buy, (c) what it’s unique attributes are, (d) how you plan to sell the product into a new market, (e) what the product competes with, (f) what people and resources are needed to make and sell it, and (g) how \$1 million will be used to create and sell the product. (note: you can write a-g items above on a flip chart so each person has a guidance for their 5 minute presentation). This exercise should reveal something about each group member – their likes/dislikes, qualities they consider important/avoidable, etc. If you’d like, give special recognition to the best pitch – like a free dinner, or being absolved from dish duty for the evening.

**Leader begins:** The leader can welcome the group and go through the goals for the group’s time together:

- To learn more about our fellow members of the group & share fellowship
- To develop a more detailed plan for our lives based on our life missions
- To better understand the unique talent/gifts God has given us
- To have fun!

**Opening Reading:** *Proverbs 16* [To man belong the plans of the heart, but from the Lord comes the reply of the tongue...)

**Leader Continues:** For those of you who have ever been involved in the creation of a new business, or worked with entrepreneurs, or invested in a start-up company, this Retreat will seem familiar. The retreat mirrors the planning that one would do in starting up a new enterprise – from identifying the mission, to thinking through the “product”, recognizing who’s on the team, to understanding the “market” and laying out a game plan for this years advances.

An entrepreneur is often identified as someone who creates something out of nothing, who takes many risks in the process, and who is constantly re-inventing an approach to success. What makes an entrepreneur successful? Most people think it’s good luck. But successful entrepreneurs know they have to “plan their work” and then “work their plan.” A wise man once said: “If you don’t know where you are going, then any road will get you there.” Do you sometimes feel like you are following “any road”? A good entrepreneur has a vision and a mission. He knows how to marshal resources to reach for this vision, who to include on the team, what market to focus on first, who he’s competing with, and what his best assets and liabilities are.

*[Leader may want to reference Addendum A list – and highlight elements of the entrepreneur’s plan.]*

If we consider our own lives, we can view them just like an entrepreneurial endeavor. It helps to have a plan of record that we can refer back to and adjust over time as a means of navigating life. It helps to have the tools, the knowledge, the team, the tactics – just like the entrepreneur.

As a starting point, let’s review one way of comparing an Entrepreneur’s plan to our own Life Planning.

- Have group members open up binders and walk through each section of the Life Plan Outline on page 1 – describing each exercise and where it fits into the plan. Take time for questions on this outline.

**Leader Continues:** At this time, we are going to begin with a clean version of the Mission Statements that we created in our weekly gatherings. A Mission Statement could be crafted around one of the following lines of thinking:

- God’s purpose for your life
- Your primary purpose or direction in life
- How you want to be remembered when you are gone (your legacy)
- A statement that would define success for you

**Pairs Discussion (20 min):** The Leader asks group members to pair off into groups of 2 and each person reads their Life Mission to the other. The “listener” can ask several questions to further qualify the mission or add clarity to it. After each person has talked for five minutes and

received feedback, then he should write down his “re-worked” mission statement into the section of his binder called “Mission”.

**Group Discussion (30 min):** The Leader asks each member of the group to read their Mission Statements and describe what led them to identifying this statement as their guiding life statement. Other members of the group can ask qualifying questions in order to help sharpen the focus of each Mission. Note: Those group members who do not yet have a Mission Statement could be encouraged to quickly craft one and write it down onto one of the blank pages in the Binder.

**Readings:**       **Acts 13:36** [*“For David...served the purpose of God in his own generation.”*]  
                      **Psalms 33:11** [*“His plans endure forever; His purposes last eternally.”*]  
                      **Proverbs 4:26** [*“Know where you are headed and you will stay on solid ground.”*]

**Written Exercise (10 min):** Leader next has group flip to the section called “Values” in the binder and write down three questions:

- 1) What do I most value in my life (consider family, relationships)
- 2) What characteristics do I most want others to know that I have?
- 3) What are my core life values?

**Readings:** Appoint someone in group to read: **Matthew 5:1-12** [*The Beatitudes*]

**Bio Break (10 min)**

**Leader Continues (30 min):** We are next going to flip to the section of the binder called Personal Definition and write down the following categories (one per side of paper):

- Self (personal traits) – elements of me
- Talents – things I have developed a skill in
- Experiences – key events and activities in my life since childhood
- Passions – things I am most passionate and excited about
- Accomplishments – things I’ve won, or conquered; key milestones in my life
- Relationships – key relationships in my life

*For each page, go ahead and write down all the details about your own life that you can remember.*

**Readings:** Appoint someone in group to read: **1 Corinthians 1: 1-11** [*“Now about Spiritual Gifts....”*]

**Group Discussion (30 min) :**

- Have each person in group share with others what their top “Definition” of themselves might be. *How would answer the question at a party “Who Are You”?*
- Leader asks group to circle in color those words that best describe themselves as we go around room – and add words you might have forgotten but here someone else bring up.

**Individual Writing Continued (30 min) :** Leader says: The last part of our exploration before breaking for the day will be to construct a list of “Assets” and “Liabilities” that each of us have.

- Flip to the section of your Binder called “Balance Sheet”. On the first page, write all the positive things that you have in your life – examples could be Good health, resources, specific people, your best skills, opportunities.
- On a second sheet of paper, write down all the liabilities or responsibilities you have in life: those things you’re burdened with , things you’ve agree to manage, things that are dependent upon you. This can be financial, spiritual, inter-personal, physical, emotional. Anything that holds you back.

**Group Discussion (30 min) :** Leader asks several open-ended questions to the group?

- Did you find that you had more assets or more liabilities?
- Did you find that most assets have a corresponding liability?
  - If so, for each corresponding set of assets/liabilities, was the net -/+ ?
- If you net out your assets and liabilities, are you running at a negative or a positive overall net value?
- What could you do to increase the assets even more?
- What could you do to diminish the liabilities?

**Reading: Deuteronomy 2:7** *The LORD your God has blessed you in all the work of your hands. He has watched over your journey through this vast desert. These forty years the LORD your God has been with you, and you have not lacked anything...*

**Closing Prayer:** *Lord, thank you for opening our eyes to the path our lives have taken. We thank you for being with us through all the legs of our journey. Help us to think more about our lives in the coming day and put in perspective all the precious gifts you have given us in every stage of our journey. Please help us to understand ourselves better so that we can do Your Will. In your name, Jesus, we pray. Amen.*

#### **Dinner Break and/or break for liturgical service**

- A liturgical service or Catholic Mass – we recommend inviting a local priest, minister, or pastor, to lead this – can be very spiritually fulfilling exercise. Invite them to join you for afternoon discussion, so they can see what the group is working on; invite them to join you for dinner.
- For dinner, the group can share fellowship at a local restaurant or plan cooking a dinner together
- After dinner, the group can sing along to guitar songs (if someone in the group is musically inclined) or watch a related movie
- Recommended movies for Spiritual Planning are:
  - Forrest Gump – with Tom Hanks
  - It’s a Wonderful Life – with James Stewart

### **Day Two: “Putting the Life Plan Together”**

**Opening Prayer:** *Lord, thank you for the gift of these two days together for our group. We appreciate the time we have to think about the gifts and talents that you’ve given us so that we may better understand how to serve you and others around us to the best of our ability during this short time that we have here. We acknowledge you and your Son, Jesus as the examples that we wish to follow as we live each day of our lives. Amen.*

**Leader Begins:**

- Recap the first day of activities and the purpose of these activities and ask the members of the group what insights they gained from the previous day's work.
- The purpose of today is to continue on with our exercises for Life Planning and to take all the components we've gathered and knit them into a cohesive plan that we can leave here feeling exhilarated to go out into the world and put into action.

**Readings:** **Proverbs 16:3** [*Commit to the Lord whatever you do...*]

**Individual Writing (15 min):**

- **Leader:** Yesterday, we wrote out our gifts, talents, experiences, passions, accomplishments, best assets and even liabilities. Turn to that part of your binder and briefly review your responses to each of these areas.

Write down in the section called "Unique Value Proposition", the top 10 values that are most important to you in your life. Examples of "values" might be: Balance, Love, Empathy for others, Contributing to others, Joyfulness, Passion, etc., etc.

**Group Sharing and Discussion:**

- **Leader:** Have each member of the group share their top 5-10 values, then have others in the group suggest additional values that the person may want to add to their list.
- **Readings:** **Matthew 25:14-31** [*Parable of the Talents*]

**Leader Continues:** Before we get to our planning phase of this Retreat, we have several more things to inventory about our own situations. Much like the Entrepreneur, our lives are in the context of others around us – we are in a particular environment (sometimes called a "market"), there are others in this environment (sometimes called partners or "competitors") and there are people we hire within our own organization to help us (call it the "Team").

- **(5-10 minutes)** Flip to the section called "Environment" in your binders – Along the left side of the page rite down the areas of our life that are environments or rough areas in which you live your daily life. Examples might be: work, volunteer coaching, church , home/family, non-profit volunteer work, etc, etc.
- Next to each area that you have written down, write down the reasons that you enjoy being a part of that environment, and write down the key "values" or benefits that you get from being part of these environments.
- **(5-10 minutes)** Next flip to the section called "Competition" in your binders – Write down the distractions, bad habits, or responsibilities that take your focus away from the environments or activities that you most enjoy doing.
- **(10 minutes)** Next flip to the section called "Team" in your binders – Write down all of the key people in your life. It sometimes helps to think of teams as concentric circles around you: in the core you have God, around that is Family, around that is Friends, around that is Workmates, acquaintances, etc.

- Next to each person that you come up with, write a few words as to what this person brings to your life or what it is you enjoy most about being with them

**Leader Continues:** Break into teams of 3 people. Send each team out for a 30 minute walk in the sunshine – with the following mission: each person on the team gets 10 minutes. The person should start with an overview of their Mission, and then talk about some goals that they might have for this year in obtaining these goals. The other two people can suggest additional goals that might make sense to set for the year. Concrete goals (“I will lose 20 lbs by 10/30”) will help to focus this.

- Once participants return from their walks, wait until everyone is back in the group and sitting down, then encourage everyone to turn to the Goals section of the Binder, and label that first page “**Overall Goals for 2xxx**”.
- Have each person consider the goals for the year that you and your team-members discussed on your walks and write those down under “**Overall Goals for 2xxx**”

### **Lunch Break (45 min)**

**Readings:** [Matthew 5:14-16](#) [*“You are the Light of the world...”*]

**Individual Writing (15 min):** Leader now prepares group for writing exercise to synthesize all of the observations made during the first part of retreat.

- We’ve arrived at the “action planning portion of our Retreat, where we match our life mission statements to a specific short-term strategy for the current year.
- For action-planning, many entrepreneurs rely on the following formula – study the situation (market, customer, etc), build a product, test the product in the world, refine the product – and launch. We’re going to plan to do the SAME thing. In this case, the product is YOU. And the features of the product are all the things we’ve been tracking for two days – your talents, your experience, your values, your assets.
- Looking at your list of goals for this year, select and circle ONE goal that you feel would get you the closest to your Life Mission. For the purpose of this afternoon, we are going to select a goal that we’d like others in the group to support us with during the year in regular “customer refinements”. And it should be something challenging, and something meaningful.
- Transfer and re-write your goal concisely at the top of the first page in the Section called “Strategies”.
- Flip to the section of the Binder called “Strategies”. On the first page, we’re going to write out a list of all the things we can think of that would help us achieve your particular goal. These can be general. For example, if your goal is to “Become Closer to my Children”, then strategies might be: find things we can do together, spend more time together, give them something that expresses my love, write something for them, take them on regular family outings, spend time each day with them, etc., etc.

**Group Discussion (60-90 min) in Planning Exercise:** Arrange chairs in a circle – have each member come up to flip chart and write down their overall goal for participants flip to the section of Binder called “Action Plan”. This Group process is designed to use the power of the group brainstorming to help you arrive at a series of possible “Action Items” for yourself...ways to implement the strategies you’ve come up with – like an Investment Plan for an Entrepreneur. As you get up in front of the group – write down your “Goal” at the top of your page and **3 of the top strategies** you’ve come up with for addressing this goal.

For each participant, the Leader must maintain a stop-watch and allow about 5-10 minutes per person. The Leader prompts each person to briefly explain their goal and 3 strategies, and then write down the following (allow space between each word):

- **Team**– what team is available to me to assist me in reaching this goal. What team member is missing?
- **My Assets and Talents** – What are the talents and assets that I’ve got which I can apply to this goal?
- **Resources** – What resources do I need that I don’t presently have to accomplish my goal?
- **Competition** – What are some things that could be sources of distraction from this goal that I can avoid or change?

**Final Writing Exercise (10 min):** Encourage participants to write down a list of the things that they can do in the next two weeks to get started with their Action Plan. People to call, plans to make, items to purchase, etc.

**Readings:** [Proverbs 16:3](#) [*Commit to the Lord whatever you do...*]

**Closing Prayer:** *Lord, we are very thankful for this time you have afforded us to be together, to consider ways that we can be more directed in our Life Missions and in understanding who we are and making the most impact we can in our world. In the weeks to come, please give us the strength and Light to achieve the goals that we’ve created in this Retreat, and help us to achieve our Life Missions. In your name, Jesus, we pray. Amen.*

## **Addendum A: Comparing an Entrepreneur's Plan to Your Spiritual Plan**

### **THE ENTREPRENEURS PLAN** (Focus: realizing shareholder value)

Mission  
Product/service description

Unique value proposition

Market and segmentation

Competition

Team

Go-to-Market Strategy

Investment Plan & Funding Needs

Exit Strategy

### **YOUR LIFE PLAN**

(Focus: realizing personal value)

Personal Life Mission  
Personal definition

- "STEP – AR" – Self (personal traits), Talents, Experience, Passions (internal assets) and Accomplishments, Relationships (external assets we can build on)

My unique assets and responsibilities  
(from Personal Definition items, list core those items that make you unique and that you want to invest in – link to Balance Sheet exercise?)

Environments I am in:

- life components (work, family, etc.)
- Percentages of where time is spent

Distractions and detriments (areas that keep us from truly investing in ourselves (such as bad work environment, unhealthy relationships, etc.)

My team-members in life

- God, family, friends, mentors, counselors, etc)
- Roles and missing members

Personal Go-to-Market

- Activities that engage us in the wider world, such as in the community, church, sports, clubs, etc.

Action Plan for this year:

- Prioritize my unique assets for investment (address my liabilities)
- Identify team members and activities that will support that investment 'strategy' in the coming year
- Resources needed (team, time, activities, money)

Life Legacy

- from Mission and Vision, identify the personal legacy for family, community, etc.
- build on assets to develop meaningful plan

## **ADDENDUM B: RESOURCES**

- The Seven Habits for Families – Stephen Covey
- Purpose Driven Life - Rick Warren