

SENIOR CONSULTANT

The Voice of the Investment Management Consultant

Visioning: What You Can't See Will Hurt You!

Michael Lovas, C.Ht.

Simple question: Is it true that the best you can do for someone is help him realize his vision? If so, then it's also true that you must be able to help him see that vision. And, if that's true, you must be able to do it for yourself – right?

It seems that every top advisor talks about visioning, but no one actually knows how to do it. That is what this article is all about. If you don't know how to tap into your vision and life purpose, you can't really operate at the top of the A-level game. If you want to claim the highest ground, you must be able to strut that turf with confidence.

What do most top advisors see when they close their eyes and visualize their futures? As ironic as it seems, most see little more than what they saw with their eyes open this morning.

Most see numbers. They say, "I want to increase my assets under management." Or, they say, "I want to raise my earnings to \$900,000." Where's the magic in that? How does that vision separate you from a guy making cold calls all day long? If you're unable to see your own vision, and you don't know how to guide your clients through the process of seeing their own visions, then, can you honestly call yourself an elite advisor? Or, are you actually playing a B-level game exceptionally well?

Do financial people lack the ability to visualize? Are they simply missing a gene for visualization? No. They simply have not yet learned how to do it. They have not yet been guided into relaxing enough to tap their intuition.

Quick Test: Close your eyes and listen. Take a minute and just quietly listen. Do you hear your thoughts reminding you about things you need to accomplish? As long as you hear those reminders, you will not visualize your future. And, if you can't see your own future, you sure can't help anyone else see his. All you can do is cross your fingers, hand him a 2020 calendar and say, "Go ahead; fill it out."

Back to you. If you don't know what you're moving toward, you're like a passenger in an old pick-up truck speeding down a country road when the steering wheel comes off. You're completely out of control, and you

run into a pasture, and ... well, at least that was my experience many years ago. Like a coach who's run out of techniques, the driver was working desperately to put the steering wheel back on, and I was frozen wide-eyed. We were speeding toward some destination in the future, but where? A pond? A telephone pole? I prayed it wasn't our final destination.

Perhaps it's more appropriate here to remember Yogi Bera's words, "If you don't where you're going, you could end up some place else."

If your vision of your future is no different from what you saw this morning, you might as well retire today. Congratulations, you've arrived! But, could there be something better for you? If this morning was just OK, is that good enough for you? Is that the best you can expect for yourself? Will your epitaph say something that you'll be proud of? Or will it say, "I don't know what happened; one day he just stopped."

If you don't have your vision for your future and if this morning didn't represent time on a pristine plateau that represents your personal perfection, then you might need some help prioritizing the pieces of your personal puzzle. The process for visioning

isn't taught at the American College. You don't get CE credits for it. Your business coach probably doesn't know how to do it. It's comes from some pretty specific training and enough creativity to get good at improvising the various relaxation and visioning techniques.

Bottom Line: Does what you see for your future excite you or fill you with a deep sense of personal well-being, or satisfy you in the most wonderful way? Do you see yourself using your best skills, talents and strengths, and doing something you're passionate about? If not, or if you can't capture the vision, then you'll probably want to get some help finding your vision and articulating your life purpose.

But, the question remains: "What is the process?" How do you do those things?

I use two approaches. As a clinical hypnotherapist, I'm licensed to take you into a deep relaxation and guide you through various visioning experiences. As a self-development facilitator, I've been trained to ask you some simple questions and use your answers to

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help you articulate your life purpose. Your vision and your purpose are intertwined. By the way, your business elevator statement is connected to both of them. Here is one of the processes I use.

Step One

The first piece of the process is to recognize what you don't see. Let's borrow an experiment from my friend, Bruce Wright. Get out a piece of paper and let it represent the weekly planner for a 5-day period. Make it 10 or 20 years from now. Essentially, it is the day timer, filled with activities that ignite your passion - for your future clients and alliances. "Go ahead; fill it out."

Most people can write a few things on day one, but when they start on day two, that's where they stop. Go ahead and try it. Feel what happens in day two. You begin to see that you may not have a vision for your perfect calendar, but you might have a perfect day. That just means that you either don't have a clear understanding of your life purpose or your vision is too small. Both are normal.

When I do this process with wealthy people, many of them write "GOLF" right in the middle of the page - on every day. That's not a perfect calendar. It's a perfectly short-sighted calendar. What happens to your perfect life when arthritis keeps your off the course? What happens when your sight gets worse and you can't see the ball clearly? What happens is depression. That is the logical conclusion of golf being the only entry on your perfect calendar. Depression leads to alcohol abuse, which leads to liver failure, which leads to disease and death. What's the worst that could happen? Your short-sightedness could cause your death. How's that for a perfect calendar?

Step Two

Remember the listening test above? You heard your internal voice because you were not relaxed. So, Step Two is to relax. Since most advisors are not trained in self-hypnosis or yoga, it's reasonable to assume you don't know how to relax deeply, quickly and purposefully.

Try this. Visualize a candle in front of you. Or, put an actual candle in front of you. Take a slow deep breath and hold it for five seconds.

Then, as you exhale, do it slowly enough that the candle doesn't flicker. Now, do that ten times. Voilà, you're more relaxed. What happens when you apply this relaxation technique to visioning in business? You can tap into brilliance. This is precisely how the PT Cruiser was created.

Step Three

What are the most important things in your life? Only you know, so obviously, there's no wrong answer. Sadly, many people don't list family members. That's OK, this isn't a domestic responsibility test. It is a process to identify the things that you feel are most important in your life. As you would expect, many people don't list their careers here. That's OK, too. The future isn't here yet. There's time.

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Once you have the list, put it order. This is called your "hierarchy of criteria." Unless you recognize this hierarchy, you are in danger of focusing on the wrong things. Johann Wolfgang Von Goethe said, "Things which matter most must never be at the mercy of things which matter least." Let's modify that, "Things which matter most should not be at the mercy of things which matter less."

Step Four

Can you see the door of your first home? If not, search your memory and find your favorite home from your childhood. What color is the door? Is the mailbox next to the door? Is there a window in the door? Do you see steps leading up to the door? Find the specific emotions or feelings you associate with that home. What are they?

Step Five

During your life, you took action or did some little things that made you feel important,

or fulfilled. I'm not necessarily talking about saving a baby from a burning house. I'm talking about something you might do on an average day. Teach someone to read; help someone make an important decision; deliver food to an elderly friend.

Recognize one specific event, not a type of event. You want to say, "The time when I" You don't want to say, "All those times when I" Remember every detail of that specific event and pay particular attention to how you felt. How did you feel about it? What was the meaning of it in your mind? Take notes on what you feel.

Can you see that this visioning process is completely controlled by you? I ask you some questions and help you, but you do the work. It's like feeding the safety rope to someone climbing down a mountain side. The guy at the end of the rope does the work. When you and I do this, I'm feeding rope to you as you find your own way down the sides of your mind. When you work with a client, you feed him the rope.

Conclusion

This article was a simplified trip into visioning. For most people in the financial industry, it is their first glimpse into their vision and their future. For many, it is the first time they've ever been asked to identify the things that are most important to them.

A good coach, facilitator or consultant will use many different visioning techniques. Different people respond better to different approaches. The important point is that whoever helps you through this process must possess the training and experience to possess options and alternative approaches to help you tap into your vision. ■

About the Author

Michael Lovas has the best job on the planet. Founder of [AboutPeople](http://AboutPeople.com) in Dallas, he helps people like you improve their lives. Using a combination of their own proprietary programs and tools, along with "the best of the best" psychology, neuro-linguistic programming and "life strategies" tools, AboutPeople teaches professionals to help their clients at a higher level. For more information, contact Michael at 214-366-0919 or michael@aboutpeople.com.