


 Wealth Counsel®


## Roadmap to Success

By: Bill Bachrach, CSP



Like most of us who care about being successful, chances are pretty high that when you look in the mirror you see two people: the person you are and the person you're capable of being. It is important to be able to chart a course which will guide you through this journey arriving at your destination: the capable of being. Let your Success Road Map® be your guide! You will discover how answering the important questions that drive this fun tool can help you have your best year ever and enhance your life forever, regardless of external economic conditions that are beyond your control. Your Success Road Map® can be the launching pad for you to experience more success and happiness than you might have previously imagined possible.

For most people, their Success Road Map® serves at least two critical purposes:

1. It provides the framework from which you do all of your business and life planning.
2. It serves as a powerful tool to help you stay on track and get back on track when the inevitable crush of too much to do and not enough time drives you off your plan.

Let's be honest with ourselves; most of us would be much more successful if we would just consistently do what we already know needs to be done.

Peter Vidmar was the captain of the 1984, gold-medal-winning men's Olympic gymnastics team, and the Olympian who scored a perfect ten on the pommel horse to capture gold in that event. Since then he has enjoyed a very successful career as a motivational speaker and author. He says, "To be a champion you only have to do two things: work out when you feel like it, and work out when you don't feel like it."

We all do what needs to be done on the days when we feel like it. Where do we find the right inspiration and the little

nudge we might need on the days when we don't feel like it? The answers are on your Success Road Map®. It serves as a constant reminder of the values and goals that drive you. It helps you stay focused on the action required to bridge the gap between where you are now and where you want to be so you achieve your goals for the reasons that are important to you. People often describe their Success Road Map® as a simple tool that provides clarity, focus, and inspiration to help them maintain the perspective that keeps their lives in balance.

Financial professionals use their completed Success Road Map® as the framework and basis to help them build a community of Ideal Clients and improve their quality of life.

Any leader, mentor, or coach can do the same for his or her people.

By the way, age or length of time in the business is not a factor. If you have a future, then having a Success Road Map® will help you make the most of it. You're never too old to plan your future. As Peter Drucker, the legendary management guru, once said, "The best way to predict your future is to create it."

There are three core elements of the Success Road Map®. The first element is the Values Conversation™. Values are the "emotional why" behind the "tangible what" of your goals. Roy Disney, Walt's brother, is famous for having said, "When your values are clear your decisions are easy." The word success means different things to different people. The question that drives this part of the Success Road Map® is, "What's important about 'success' to you?" When your Values Staircase is complete it will likely contain three levels of values. Initially your answers usually begin with the more immediate, fundamental things that drive you such as financial independence, security, and freedom. The answers above them tend to be things that matter to you about others, such as family, friends, com-

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munity, and/or the world. As you near the top of the Values Staircase, you will probably list the more esoteric, philosophical, and spiritual things that matter to you, similar to Maslow's "self actualization" concept.

The second element of the Success Road Map® is the Goals Conversation™. For the purpose of your Success Road Map®, your goals are the personal milestones that you use to measure your success in life. These are the big things like buying a home, financial independence, funding your children's or grandchildren's educations, establishing a foundation, building a successful business, etc. These goals tend to be things that require money and planning to achieve. Your goals are the tangible what you want and your values are the emotional why you want it. The combination of the two increases the probability that you will actually do the work required to achieve your goals for the reasons that are important to you.

The third element of the Success Road Map® is the Now/Be Conversation™. This conversation is driven by the question, "Where are you now and where do you want to be in the key areas that relate to the achievement of your goals and your quality of life?" A few of the categories to consider may include: gross revenue or production, personal income, net worth, debt, number of clients, number of Ideal Clients, client satisfaction score, real vacation time, fitness level, body fat, blood work numbers, exercise schedule, time with people you care about, prayer, meditation and fun. This is just a partial list of possibilities. The most important factor is that you create something that is relevant and inspiring for you. You may also find that you build and modify elements of your Success Road Map® over time. You will certainly have fun creating your own Success Road Map®!

Once you have created your own Success Road Map®, take some time to check your choices and the veracity of your "now/be" goals. Charting the course is just the first step in your journey to your next level of success. There is no better time than right now to think, create a plan, and take action!

In any endeavor, personal or professional, there are always

a handful of activities that produce most of the results. Your Success Road Map® will help you identify those key activities and help you stay focused on actually doing those key activities for longer periods of time. Many successful advisors find it valuable to hire a coach who can help them organize their calendar around their priorities and then hold them accountable to honor the calendar.

When the inevitable crush of too much to do and not enough time or the bad news of the day distracts you from your priorities, your Success Road Map® can help you reconnect to your priorities, get you back on track, and stay on track longer, thus producing better and more consistent results.

In this time of economic uncertainty and world turmoil, your Success Road Map® can help you focus on what you can control, and have the confidence you need to do the work your goals require to achieve them, regardless of external circumstances.

Enjoy the journey!