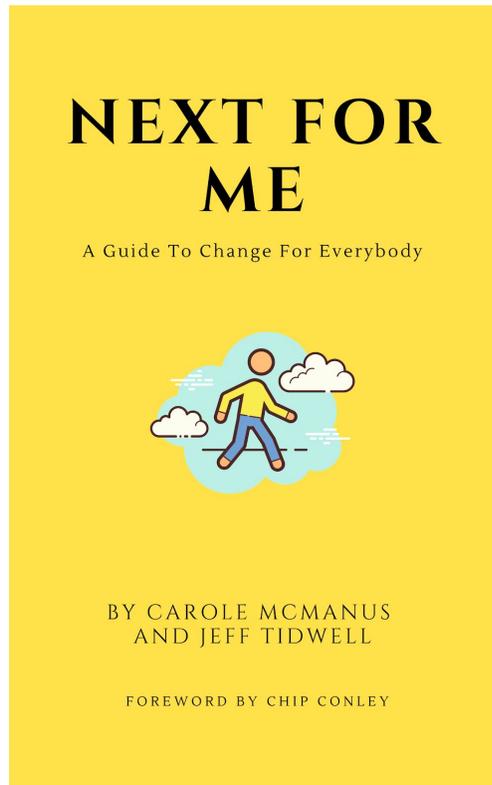


NEXT FOR ME:

A Guide to Change for Everybody

Course Workbook



In this course we offer a set of exercises that should help you see your “next thing” in a more expansive light. Starting at **Your Philosophical Center** we dig into the values, mission, people and associations you make along the way. Then on to **Fresh Perspectives** with some fun techniques founded in open-mindedness including visualization, using constraints, mind mapping, and even deja vu. Then we come back to earth with **The Tactical**, our most useful survival techniques for hacking through the day-to-day and having the endurance to stay standing.

We encourage you to print out this workbook. As well as the assignments in the course, you can have some fun drawing, mapping, and brainstorming on these pages.

If you like what you create snap a picture and upload it to the course assignment.

Table of Contents

YOUR PHILOSOPHICAL CENTER

IDENTIFYING YOUR NEXT “THING”	3
Exercise 1: What Now?	3
KNOWING WHAT YOU STAND FOR	4
Exercise 1: Identify Your Core Values	4
GUIDING PRINCIPLES	5
Exercise 2: What Are Your Guiding Principles?	5
MISSION	6
Exercise 3: Defining Your Mission Statement	6
CO-FOUNDERS	8
Exercise 4: Being Vulnerable with Co-Founders	8
ADVISORS AND MENTORS	10
Exercise 5: Find Your Advisors	10
PARTNER POWER	12
Exercise 6: Engaging and Growing Your Network	12

FRESH PERSPECTIVES

MINDFULNESS AND MEDITATION	13
Exercise 7: Meditation	13

VISUALIZATION	14
Exercise 8: Visualize the Best Possible Outcome	14
WRITING	15
Exercise 9: Chronicling a Week in the Life of Your Endeavor	15
DRAWING	16
Exercise 10: Draw Your Biggest Roadblock	16
MAPPING	16
Exercise 11: Create Your Map	17
USING CONSTRAINTS	18
Exercise 12: Role Switching	18
DEJA VU	18
Exercise 13: Deja Vu All Over Again	19
BE A HACKER	19
Exercise 14: Hack It!	20
SELL IT	20
Exercise 15: Your Consumer's Persona	21
FINANCIAL REALNESS	21
Exercise 16: Financial Readiness	22
EASY ON THE DEPENDENCIES	23
Exercise 17: What are You Dependent On?	23
PUBLISH THEN PERFECT	23
Exercise 18: Your Publishing Universe	24
Exercise 18: Your Publishing Universe	25

COMMUNITY	26
Exercise 19: Who Is Your Community?	26
DISTRACTIONS	26
Exercise 20: Time as Your Friend	27

IDENTIFYING YOUR NEXT “THING”

Exercise 1: What Now?

You need to start somewhere, so start by writing down your proven skill set—the achievements highlighted on your resume and LinkedIn profile. Next, try thinking beyond the public facing achievements. What in your personal life do you see as an achievement?

Which of these do you really enjoy, and want to keep doing?

Which of these would you rather not do any more?

Write down your hobbies and interests outside of work. Do any of these overlap with your “work” skill set? Are any of them a viable way to earn income, or would you rather keep them “just for fun”?

Take a look at people in your professional and personal networks. Are any of them doing the work you think you want to be doing? Write those names down and set the list aside. We’ll address how to reach out to them in Exercise 5 , Find Your Advisors.

Exercise 1: Identify Your Core Values

To get a sense of what your core values are, ask yourself ...

1. What's more important to me, results or relationships?
2. How does my work reflect who I am? Or does it?
3. What impact does my work have on the world around me?
4. What is something that makes me feel proud about my work?
5. What does work-life balance look like for me?
6. What do I want my legacy to be?

Exercise 1: Identify Your Core Values (cont'd)

Ask the people you work most closely with (your co-founder, your colleagues, your partner) to write down their core values too and share your results with each other.

7. Which ones are aligned?

8. Which ones are different?

It's great when everything is out in the open, there is no ambiguity. Now expressed, the boundaries are clear.

It's a good idea to revisit these core values from time to time, as you evaluate your endeavor's impact on your life.

GUIDING PRINCIPLES

Exercise 2: What Are Your Guiding Principles?

Using the Core Values you have identified, expand upon them to apply your values in a practical sense.

Example:

Core Value: I am truthful

Guiding Principle: I strive for the truth in my interactions with colleagues and partners.

List your core values below and then a corresponding guiding principle.

Core Value:

Guiding Principle:

Core Value:

Guiding Principle:

Core Value:

Guiding Principle:

Clean up the output. Create a list of your core values. Create a list of your guiding principles.

Make a commitment to yourself that this is your way of operating and that you'll revisit the Guiding Principles regularly.

MISSION

Exercise 3: Defining Your Mission Statement

Your job is to articulate what you're doing and why in a concise statement. Since this may be new to you, take a look at companies and individuals you admire. Do they have a mission statement on their website? If you like it, write it down, fill a page with the mission statements that really speak to you.

Go big with your ideas. It's just you and your mission for now anyway. If the absolute best possible outcome was true what would your mission be?

We found these mission statements that might inspire you:

Nike:

"Bring inspiration and innovation to every athlete in the world.*
If you have a body, you are an athlete."

Oprah:

"To be a teacher. And to be known for inspiring my students to be more than they thought they could be."

Patagonia:

"Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis."

The Bill and Melinda Gates Foundation:

Guided by the belief that every life has equal value.

TED:

"Spread ideas."

Continued on next page.

MISSION

Exercise 3: Defining Your Mission Statement (cont'd)

Now, look at the mission statements of others in your area of focus. What do they address that you'd like to address? What do you think is missing? Highlight action and aspirational words.

Your mission statement needs to get right to the heart of what you're doing, preferably in just one sentence. Write down some of your own action words, then some aspirational words, and from that draft your Mission Statement.

Action words that apply to my endeavor:

Aspirational words that represent what I want my endeavor to be:

First drafts of my mission statement:

You may not have your mission statement nailed just yet, but now you've got something you can work with to represent your message to the world.

Exercise 4: Being Vulnerable with Co-Founders

If you can, try this early on before you go down the wrong co-founder road or end up in a situation where you can't find resolution. If your plan is to go solo, adapt this exercise for a conversation with your spouse or significant other.

Consider how comfortable you are being vulnerable with your co-founders. There will be money matters, rejections, and long hours. Are they resilient? When they get hit hard, can they bounce back? If they are (and we hope they are) glass half full people can they reassure you that they'll stick around when times are rough?

Have each founder answer these questions and see where there is alignment and where there are disconnects.

1. When finances are tight, are you in a position to forego a salary for a period of time?
2. If expected sources of income and capital (salaries, sales, or your savings etc.) dry up, can you help identify other, new sources?
3. What are your responsibilities outside the business? Are there family obligations, civic duties, other ventures that will take up your time? What kind of time commitment can you give to the business each week/month?
4. Where do they see the company in 1, 2, 5 years' time?

Exercise 5: Find Your Advisors

Our advisors have been instrumental in the creation and success of Next for Me. Aside from being trusted friends and colleagues, they share qualities that embody our most aspirational goals: they are taking the things they've learned in their distinguished careers and creating amazing second acts for themselves. They also Get It—they see why what we're doing is needed and relevant, and they're helping us in innumerable ways.

Even if you're going solo (in fact, especially if you're going solo), look at your network and friends of friends who might be good advisors—people you can go to for wise counsel, share ideas with, or just vent to. Use this exercise to identify the qualities that are important to you and what skills you're missing. Then see how the people you know might help you bridge the skills gap.

Example: John, a well-connected software engineer you worked with a couple years ago.

Qualities you admire about him: He has always kept a cool head in a crisis, and is personable as well as professional.

The expertise he brings to the table: He has hired and managed big teams at a couple of Fortune 500 companies, and can advise you on your technical hiring criteria, as well as introduce you to some of his colleagues who are angel investors.

You're looking for people to help with things you know you can't tackle on your own, or could do better with another person's input.

Continued on next page.

ADVISORS AND MENTORS

Exercise 5: Find Your Advisors (cont'd)

Look at your contacts and identify at least 3 or 4 who might be able to help with your venture.

Name:

Qualities you admire about them:

The expertise they bring to the table:

Name:

Qualities you admire about them:

The expertise they bring to the table:

Name:

Qualities you admire about them:

The expertise they bring to the table:

Now it's up to you to reach out and get them excited about the prospect of advising you!

Exercise 6: Engaging and Growing Your Network

Revisit these questions on a regular basis:

Advisors: What can I do to engage my advisors? One (non-intrusive!) example: Sharing/reposting something they've shared on social media along with your own comments/endorsement.

My Network: List 3 things you can do to grow your network, like identifying second- or third-degree connections on LinkedIn who you'd like to get to know, and the first-degree connections who can introduce you.

My Partners: Identify 2-3 new potential partners. One tactic is to set up a Google Alert for specific terms relevant to your business, to see what similar businesses pop up in press releases and news articles.

MINDFULNESS AND MEDITATION

Exercise 7: Meditation

Sit on a firm pillow, on folded knees, or on a chair as upright as you can.

Get within a couple of feet of a wall with your eyes open, this helps for focus.

Breathe in through your nose, filling your abdomen. Breathe out through your mouth.

Count 10 breaths, start again, then again. That's one set. Do that three times.

Your mind will wander and you'll zoom in on a topic and you will obsess on it and lose your count. Start again. The only thing to concentrate on is breathing in and breathing out and your upright posture.

When you find yourself obsessing on a thought, acknowledge it and let it go. A good metaphor is that you spot a cloud, acknowledge it, then let it float away.

That's it. Give it a try for 5 minutes. Now write down how you feel about everything on your plate. Notice any difference?

Over time try working your way to longer sessions. Consistency helps too. Try it for a little bit each day.

VISUALIZATION

Exercise 8: Visualize the Best Possible Outcome

Try this: Visualize (draw it if that works for you) and write down what you're doing and imagine how it turns out in the future. What does it feel like and look like if you successfully execute what you're doing?

Who are the key players?

What help did you need on the way?

Having done that visualization, will you be able to recognize an opportunity when it comes your way, and seize it?

WRITING

Exercise 9: Chronicling a Week in the Life of Your Endeavor

To get into the writing habit, start with the basics. Lists are good, a narrative is even better.

What were your goals this week? Did you meet them?

Did you notice any recurring themes this week, like a series of rejections or multiple serendipitous introductions?

Did you see yourself using skills from past jobs, or did you need to learn something brand new to get things done?

What seeds were planted for what you're working on next week?

To take your writing public (and you should) listen to the lecture "Always Be Publishing".

DRAWING

Exercise 10: Draw Your Biggest Roadblock

In the space below, draw a visual representation of the thing that is slowing you down the most. A beautiful output isn't the point. Seeing things you wouldn't otherwise is. Include the things that give that challenge fuel and limit your ability to conquer it.

Draw those things that illustrate you beating the monster with the resources and smarts you have on hand.

Exercise 11: Create Your Map

Use the map below as an example, then on the next page create your own version.



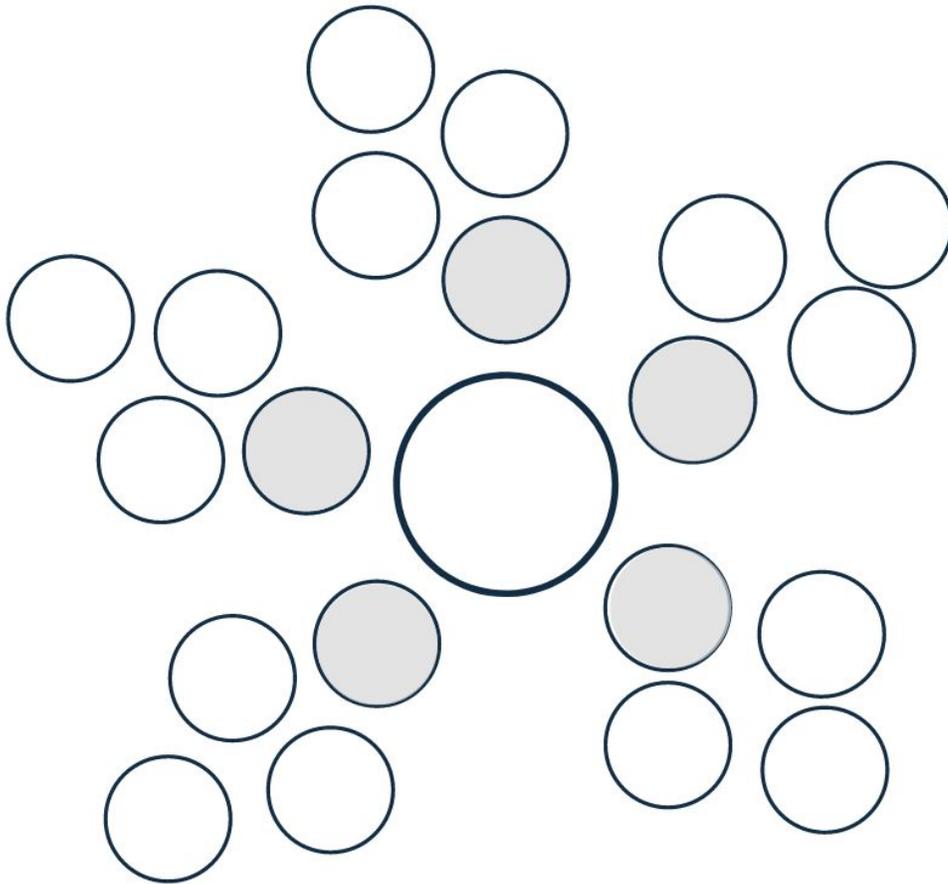
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Exercise 11: Create Your Map (cont'd)

Identify 4-6 main pillars of your planned move. Add the sub-components of those pillars.

Add who is responsible for what? And if it's just you, identify who you need to make it come true. You can assign a color or icon to each person to keep our map tidy. Add the existing resources assigned to each component, and indicate those needed to get closer to your goal.

Look at the associations and see what is needed and what might be a drain on resources.



Exercise 12: Role Switching

What if your approach to using constraints was to switch roles with your colleagues? For the sake of understanding as well as unearthing nuggets for improvement, it can really open your eyes. After you settle on who is switched to which role:

Express your idea of what their role is. What are their regular tasks and responsibilities?

Ask what they think it is that you do, and the percentage of time they think you spend on what they think are your key responsibilities.

You will be surprised at what bubbles up. Since you're all on the same path, this should be a fresh restart to get to a place of empathy and understanding for each other.

With practice you can zoom in and out of these exercises, exposing some valuable discoveries which you can then apply to your thinking and strategy.

Exercise 13: Deja Vu All Over Again

Name the last five job titles on your resume. How many of these could be applied to your current plans?

Name your five favorite job responsibilities from your past jobs. How many of these are you responsible for in your current venture? Are there any you would like to add? What/who would need to help with that?

Name your five least favorite job responsibilities from your past jobs. How many of these are you responsible for in your current venture? Are there any you would like to delegate? What needs to change in order for that to happen?

Exercise 14: Hack It!

What is frustrating you because of complexity or resource constraints?

List 5 things that would get you closer to resolving it without adding resources.

Exercise 15: Your Consumer's Persona

Starting with whatever data you have — public information and social media insights, trends reporting, survey data, whatever you can get your hands on or gather through interviews — create a few personas of your customers. Then get out there and spend some one on one time with people who might fit the profile.

Even if your product is for “everyone” (and let’s be honest, is it really for everyone?) each one will have different reasons/motivations.

Persona 1: Go ahead and give them a name and find a picture of someone that looks how they might look. You’ll be using the personas as a reference to make them come alive.

What is their age?

What is their gender? Or, if relevant to your business, are they non-conforming/fluid?

Where do they live?

What is their need, desire, or pain that would make them need your product?

What are the market conditions that make the above so?

Continued on next page.

SELL IT

Exercise 15: Your Consumer's Persona (cont'd)

How often do they make the decisions you're hoping for, and thereby buy your product/service?

How often do they make those decisions or use your product/service?

What similar/related products do they also buy regularly?

Will they recommend you or your product to a friend?

If not, what might motivate them to do so?

Exercise 16: Financial Readiness

Are you operating from a budget which aligns to your strategy or just winging it? Grab yourself a “pro forma” spreadsheet template and start plugging in some numbers. There will be speculation and presumptions to get there, but don’t let that stop you.

Identify the following:

1. Where is the income coming from? List the different ways you’ll make money. Break it out by months and quarters. Perhaps you’ll think it grows over time.
2. What is the cost of sales? What must be spent to reflect the income projections. Note that this isn’t labor or costs of operations.
3. What are your labor costs if you have them? This will likely be your most pricey expense.
4. What are your expenses. Rent, travel, taxes, insurance, and such. Do not forget legal and accounting costs which can add up quickly.

Continued on next page.

Exercise 16: Financial Readiness (cont'd)

With this rough estimation, take a stab at cutting costs in a way that will allow you to continue with the income growth. It's surprising where you can cut corners. If you make those cuts and it will impact the revenue, have a conversation with your partners or colleagues about whether that's ok for the long-term impact on your company or career.

Become very familiar with these numbers. If you had to, could you explain to an investor concisely what the projections are and how you got there?

Revisit these numbers regularly. If you have the budget for an accountant, establish regular financial reviews.

Exercise 17: What are You Dependent On?

You don't want to be dependent on the wrong money, wrong partner or resource. You want to be as independent as you can be. On the other hand, don't reinvent the wheel if there's an existing product or platform that can help you along the way with few downsides.

Identify one thing you're dependent on.

How much of an impact does that dependency have on your success?

What risks do you have if something changes (e.g., the price goes up)?

What contingencies or backups can you put in place if that thing you're dependent on disappeared tomorrow?

Try this exercise a few times and see what pops up that isn't necessary or is a risky dependency.

Exercise 18: Your Publishing Universe

Are you, or is someone on your team a proficient writer? If not, budgeting for a freelance writer to help you tell the story of your work should be a priority. Your publishing universe is the many places online to publish your stories.

Through the lens of a journalist, you would write about Who, What, When Where, and How. In this case we suggest you try this formula. Give it a try using the grid below.

Who

Write down who you need to communicate with to get out the word about what you're doing: customers, potential customers, colleagues, partners, even competitors. You'll probably communicate with each of these audiences very differently.

What

For each "Who" write the key information you need them to know about what you're doing. Is it news, opinion, sales information, product updates, a combination of these?

When

How often can you commit to these communications? It's not necessary to push out content daily or even weekly, but consistency is key. You want to provide important information in a timely way but you also don't want to look like a spammer. An editorial calendar (you are a publisher after all) will help you balance current events with evergreen information.

How

Now add the best vehicle for communicating with them. Seeing what gets engagement and surveys or informal polls can help you understand how you'll best be able to get their attention—is it an email, a newsletter, a website, an app, a podcast, social media, a combination of all of these?

Exercise 18: Your Publishing Universe

Exercise 18: Your Publishing Universe

Who			
What			
When			
How			

DISTRACTIONS

Exercise 20: Time as Your Friend

What's it gonna take to keep you on task? Try this. Quickly fill out this form for your day. Prioritize by 1-3. Estimate the time it will take to complete the task. Through the course of a day, keep your eye on the high priority tasks and document the actual time spent.

Task	Priority	Estimate	Actual

You were likely pulled into other tasks and distracted by this and that. Document those as well. What is the priority? How much time did you spend on them?

Task	Priority	Estimate	Actual

Needs a conclusion to the exercise. What to do with the output?

TAKE A DEEP BREATH

You made it!



You don't have to rethink the way you do things all at once (or listen to our advice at all for that matter). Throw one or more of these techniques into your mix. They've worked for us, and you may find them helpful, too. And, if you use the benchmark of some guiding principles, you'll know what you are doing aligns with your vision.

“Making the most of a long and multi-stage life means taking transitions in your stride.

Being flexible, acquiring new knowledge, exploring new ways of thinking, seeing the world from a different perspective, coming to terms with changes in power, letting go of old associates and building new networks.”

- *Lynda Gratton and Andrew Scott, The 100-Year Life*

KEEP THE CONVERSATION GOING

To keep the conversation going you can find us at:

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Every reference in this course and the book can be found at nextforme.com/book