

2022 Accountability Document – Sam Instone

FUTURISTIC | ACHIEVER | COMPETITION | ACTIVATOR | SIGNIFICANCE

Purpose (meaning beyond self - overarch - on the kitchen video)

- ...because...**posi+ive change** helps us **all** be **better**.

Mission (what I want to achieve)

- Seismic societal change – death of a toxic industry and the emergence of an impactful, vocational profession

Vision (the destination I see!)

- Massive transformation – individuals, companies, countries. **Better lives**.

Paradigm (factory settings – underpins)

- Be the best you can be

Guidelines – The cogs and the oil

1. Marriage – deepen connection – ‘together’
2. Family – making memories
3. Community – contribution & connections
4. Business – security, profitability and impact
5. Wellness – energy and reflection
6. Rituals – a disciplined/intentional foundation

Rituals - Strengths-based behaviours, practiced ‘on purpose’ and positioned to enhance engagement and performance around what matters most!

1. The 5 by 8 – Great day focus. Wake up early/cycle/podcast/cold-shower/time-block/eat-frog/private reflection
2. Saturday/Sunday morning ritual - carefree physical (cycling) & social (family) time – Planning – ‘Great Week Focus’
3. Daily ‘huddles’ and employee driven 1-1s - leading to others success
4. ‘Golden Time’ with Kate (separately) + family – schedule and review
5. ‘Daily List’ – Documenting the 3 key things to achieve for the day
6. Never eat alone (+eat better) & ‘The 1 random call a day’ – Building relationships & partnership
7. Learn, learn, learn; Read don’t watch/daily learning via books & podcast

Values – where I will NOT compromise!

1. Future focused – Excite, envision, innovate and transform
2. Simplicity – Keep the main thing the main thing/avoid complexity
3. Integrity – Do what I say I will.
4. Humility – First look to serve. Give don’t take.
5. Compassion – Genuine care for others and the ‘platinum rule’

Goals – 2022 – Top 5

1. Family;

- a) Kate & Sam 1 week away 'offline' together in Austria. 1 date per month organised by me!
- b) Teddy to UK in January/see my family (its been 3 years...)
- c) Family Skiing, Family Summer away, Family Diving holiday

2. Business;

- a) AES Profitability Target 2022 Hit
- b) 6 x AES 'awareness'/Client Events
- c) A year of 'relationships' – 1 day pw dedicated to building this
- d) Launch a wellness business
- e) CSR and community good/impact through becoming 1st UAE situs B Corporation

3. Financial;

- a) Simplification & security
- b) Increasingly accurate budget
- c) Sell or long-term rent UK house
- d) Agree family purpose statement – 'Money's purpose in my life (our lives) is to _____'.

4. Relational;

- a) Advisory Board created (2 meetings pa), Board members and Associate Directors strengthened
- b) 4 Qtr. meetings with personal mentor/coach
- c) 5min gratitude journal each night

6. Physical;

- a) Rest and recovery – improve sleep score on Whoop by 2% YoY.
- b) Nutrition – maintain food diary on my phone
- c) minimum 250km per week on the bike
- d) 80-85 kgs (12% max BF)
- e) Improve gut health via fasting and mixed diet

7. ME;

- a) Trek in Tibet or Japan
- b) Cycling holiday in France
- c) 2BYB Nov/Dec Thailand + CSR
- d) 1 day WFH

'Super Strength' Statement:

'Wouldn't it be great if...' positive and authentic activation and engagement through describing a better vision for the future.

FOCUS SAB: Skills – Attitudes – Behaviours – Making 2020 Great

1. Skills – Leadership/Coaching others to take meaningful action
2. Attitudes – Positivity – Excellence - WINNING
3. Behaviours – Integrity and Consistency (Rituals Led)

2021 Fulfilment Statement

To have the best year ever. Self, family and work.

2030 Vision

To have transformed the toxic financial services industry in the Middle East into a profession underpinned by 3 pillars of Chartered expertise, fiduciary duty and partnership structure + 2025-2030 STAG targets hit. Metric = Net Promoter Score of 70+

Professional challenges:

1. Creating a vivid picture of what world-leading excellence look like and helping others move towards this.
2. Helping people overcome fear mindsets and understand their thoughts impact their actions and massive action requires well-considered/reflected upon massive thoughts.
3. Engagement (additional discretionary effort) at all levels of company, understanding contribution versus entitlement, putting people into challenging positions, creating monster expectations.
4. Getting peers to understand point 3 is reliant on 'great leadership' – constant role modelling, communication/cascading, accepting challenge, engendering purpose, rapid failure/recovery, clear vision/OKRs and pos+ive mindset.
5. Complexification, 'displacement work' and lack of right action.

Barrier & Elimination

- Building self-belief/mindset and 10x thinking throughout entire AES team
- Eliminate by celebrating little wins/positivity and a vivid picture of 10-year plan/the future opportunity that can materialize for them.

Big 3 Commitments (in order)

Self, Family, Work

Start – Stop – Continue

Start – much better ‘golden time’, personal trainer once a week on upper body, Headspace, more wholefoods

Stop – Winding up my Co-CEO, so much refined sugar/chocolate, Utube after 10pm, saying anything negative if it isn't to someone's face

Continue – cycle commute (+ run commute), mountain/cycle treks

What do I want from coaching?

- Ever increasing self-awareness.
- Good questions – great answers.
- Hacks, tips, resources, information and wisdom which is going to save me the time and pain from having to find/discover it.
- Community/connections/perspective of others.
- How am I falling? Is it how I think/perceive? What opportunities am I not seeing?
- Ever improving, high performance across all aspect of my life.
- Better.