

2023 Accountability Document – Sam Instone

STRATEGIC | FUTURISTIC | ACTIVATOR | SELF-ASSURANCE | COMPETITION

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

- ...to help create **Posi+ive change**.

Mission (what I want to achieve)

- To make extraordinary things happen.
 - Seismic societal change – death of a toxic, product centric and feral industry and the emergence of a structurally different, evidence-based, impactful, vocational, new profession that helps us all live life better.

Vision (the destination I see!)

- Massive transformation – a better working world.

Paradigm (factory settings – underpins)

- ‘Grinding out the grit in the flywheel’

The relentless pursuit of organisational excellence through the ups and downs of daily business.

Guidelines – The cogs and the oil

1. Marriage – time together
2. Family – making memories
3. Community – contribution & connection
4. Business – security, profitability and posi+ive 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
2. Saturday/Sunday morning ritual - carefree social and physical (family & cycling) time – Planning – ‘Great Week Focus’
3. Daily ‘huddles’ and team driven 1-1s - leading to others success
4. ‘Golden Time’ with wife (separately) + family – schedule and review
5. ‘Daily List’ – Documenting the 3 key things to achieve for the day
6. Never eat alone (+eat better) – 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'
- 6.Courage – Making difficult decisions.

Goals – 2023 – Top 5

1.Family;

- a) Son to successfully join daughter at UK boarding school in September
- b) Meet the sister I never knew I had...
- c) Family half-term skiing, Family Easter with Grandad in Caribbean
- d) An English Summer with my family to catch-up post COVID

2.Business;

- a) AES Profitability Target 2022 Hit
- b) A year focussed on '**Great Leadership**' with Team leaders **and** future leaders
- c) Cost reductions for clients based upon our 'virtuous circle' of price disruption
- d) A year of 'relationships' – 1 day pw dedicated to building this
- e) Launch the Education business by finding world leading 'creator'

3.Financial;

- a) Family security and stewardship (disaster secure e.g., hit by a bus/heart attack)
- b) Increasingly accurate budget/cashflow based upon '100yr life'
- c) Completely renovate house over 2023.

4.Relational;

- a) Sam to organise 1 date night per Qtr.
- b) Board governance strengthened
- c) 4 Qtr. meetings with personal mentor/coach to look forward
- d) 5min gratitude journal each night

7. Physical;

- a) Rest/recovery – improve sleep to av. of 7h30 mins sleep/night
- b) AV: 200km per week on the bike
- c) Maintain 85-87 kgs (12% max BF)
- d) Improve energy/gut health via 16/8 fasting and mixed diet

8.ME;

- a) Standing on top of world's highest freestanding mountain with 12yr-old son
- b) Swim better (get a coach and learn technique)
- c) ELO rating over 1600 (chess)
- d) Public speaking/communication course

'Super Strength' Statement (Strategic and Futuristic):

'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 2023 Great

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

2023 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 a partnership structure + 2025-2030 objectives hit. Metric = Net Promoter Score of 70+

Barrier & Elimination

- Building self-belief/mindset and 10x thinking throughout entire AES team
- Eliminate by celebrating little wins/positivity and a vivid picture of 3,5, 10-year plan/the future opportunity that can materialise for them.

Big 3 Commitments (in order)

Self, Family, Work

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 landing? Is it how I think/perceive? What opportunities am I not seeing?
- Ever improving, high performance across all aspect of my life.
- Better. Better. Better. Up, Up, Up.