

2021 Accountability Document – Sam Instone

FUTURISTIC | ACHIEVER | COMPETITION | ACTIVATOR | SIGNIFICANCE

Vision (where I see me?)

Making the world healthy, wealthy and wise. Transforming the largely toxic status quo through a strong vision of purposeful self and community/marketplace improvement based upon science/evidence not 'traditional spin'.

Mission (What are you here to do? How do you create that future?)

Together we can create positive change...

(in the lives of those we serve, our profession and in ourselves/families)

Purpose (why are you here? - meaning beyond self - overarching)

...because the world needs **better**.

Paradigm (what's on your T-shirt? - factory settings – underpins)

'Be the **best** I can be'

(UK military root = be the best US military root = be all you can be)

Guidelines (What are the 'key cogs' in your life?)

1. Family – making memories
2. Business – security, profitability and social impact
3. Competition – conspiring together
4. Community – building connections/helping others
5. Rituals – a disciplined/intentional foundation

Rituals (The consistent behaviours, intentionally practiced and precisely scheduled that drive success and fulfilment in life!)

1. The 5 by 8 – Great day focus. Wake up early (4.45) private reflection/move/time-block/eat-frog/always give - don't take
2. Friday/Saturday Morning Ritual (post cycle) - carefree physical & social time – Planning – 'Great Week Focus'
3. Daily 'huddles' – leading to others' successes
4. 1 date night with wife per month
5. 'Daily List' – Documenting the 3 key things to achieve for the day
6. 4 'Rides' per week minimum (either gravel or road bike)
7. Never eat alone (+eat better) & 'The 1 random call a day' – Building relationships & partnership

Values (things I will not compromise on!)

1. Future focused – Excite, innovate and positively transform (don't disrupt).
2. Simplicity – Keep the main thing the main thing/avoid complexity
3. Humility – Esteem in which you hold others
4. Knowledge – Lifelong learning; Read don't watch/daily learning via book & podcast
5. Integrity – DISC profiles and the 'platinum rule'/ Jordan Peterson's 12 rules of Life
6. Teamwork – achieve more together than alone

My Theme Dynamics (the me that makes an impact)

Prophetic/Inspiring

Strong work ethic

Driven

Self-starter

Seeks outstanding performance

'Super Strength' Statement (me at my best)

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

My Goals – 2021 – Top 5 (what matters NOW)?

1. Family;
 - a) Pre-book summer family holiday together plus one other COVID dependant.
 - b) Pre-book 3-day wedding anniversary break offline with wife.
 - c) Father and sons' weekend - Theme parks, food and fun.
 - d) Daughter to USA on her 13th birthday/Independence Day

2. Business;
 - a) AES Revenue Target 2021 Hit
 - b) Improve internal/external experience and engagement
 - c) 6 x AES awareness Events 10 x Coaching events
 - d) Enhance impact via COIs/affiliates/partners to drive flywheel
 - e) CSR, connection and social impact through AES Education
 - f) Great 121s

3. Financial;
 - a) Sell UK house given no intention to return
 - b) Simplification
 - c) Increasingly accurate budget with cashflow projection to age 102 and plan for growth in place. Easy to follow disaster plan if hit by bus.

4. Relationships & Partnerships;
 - a) Associates and Senior Associates strengthened (coaching course)
 - b) 4 Qtr. meetings with coach
 - c) Deepen partnerships and relationships

7. Health & Well Being;
 - a) 10km in under 50 minutes + 1 x marathon
 - b) Family 5km run with family training sessions 2 x per week
 - c) 85-88 kgs (13% max BF)
 - d) 10,000km+ on the bike for the year + an ultra-event
 - e) Recovery improvement (sleep and training: growth = stress + recovery)

8. ME;
 - a) Trek to Everest Base Camp or Cycle 4 epic bike climbs in Italy if Nepal shut.
 - b) 1 day per week WFH

2021 Fulfilment Statement

To have the best year ever. Family, self & 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**.

FOCUS SAB: Skills – Attitudes – Behaviours – Making 2021 Great

1. Skills – Leadership/Personal growth – Cycling - Running
2. Attitudes – Positivity – Excellence – Circle of control – Windscreen not rear-view
3. Behaviours – Integrity and Consistency (Rituals Led)

Professional challenges:

1. Creating a 'vivid' picture of what excellence look like and helping others move towards this.
2. Helping people understand difference between their 'wants' and 'needs.' Wrong fit team members/wrong fit clients.
3. Radical candour/challenging conversations. Engagement (additional discretionary effort), contribution versus entitlement, putting people into challenging positions, monster expectations.
4. Collaborative/thoughtful leadership and communication complexity

Barrier & Elimination

Building self-belief and opportunity awareness in my team.

Eliminate by celebrating little wins/positivity and a vivid picture of 10-year plan/future.

Big 3 Commitments (in order)

Family

Self

Work

Start – Stop – Continue

Stop – French Bread, Ice Cream, YouTube after 10pm, hitting the snooze button

Start – Never missing a gym session, date night/better golden time

Continue – 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 failing? Is it how I think/perceive?
- Better.