

Jackson Health IT
PERSONAL QUARTERLY OFFSITE



Program Overview

The Personal Quarterly Offsite (PQO) is a program designed to help you achieve and sustain high performance in work and life. It is an intentional day away from the busyness and distractions of the office to reflect on the past 90 days and plan for the next 90 days. It is not a vacation day. It is work. But, the work you are doing is on yourself. How seriously you take this opportunity is ultimately up to you, but I encourage you to give it your very best. Attempt every exercise. You are worth it, and like life, you will get out of it what you put into it.

Location

Choose the location for your PQO carefully. It is your day to reflect and seek inspiration, so spend it somewhere accordingly. Even if you are extroverted, I still encourage you to spend this day alone or mostly in quiet. As such, somewhere in nature may be a better choice than a coffee shop. Find your happy place.

Timing & Schedule

The day will go fast, so make the most of it. Get a good night's rest and get to your place early, preferably by sunrise. You can make the day as long as you like, but plan to invest at least 4 to 6 hours in quiet. If this is new to you, it may feel like a long time. It may be uncomfortable. Resist the temptation to go to distractions. Unless an urgent client demand warrants it, avoid checking email, and instead spend at least 90 minutes to 2 hour blocks of time without interruption.

Here is a sample schedule:

- Plan and pack the night before: water, sunscreen, snacks, writing utensils, etc.
- Arrive at your location early (by 6 or 7am), find a good place to “work”.
- Unplug. Disconnect from media and engage in your surroundings. Consider meditation, prayer, breathing exercises, or simply being still for at least an hour. If you have been burning the candle at both ends, don't be surprised if you doze off. That's fine. You need to clear your mind.
- Reflection Exercises. Take these in chunks. Work an hour or two, then break.
- Move. Get some exercise if possible, especially if you're getting tired or bored.
- Projection Exercises. Look ahead, consider what could be, then work your way back to today. To avoid feeling rushed, plan your time so you can get to these exercises by mid-day. If caffeine is your friend, consider enjoying a little during these exercises.

Be sure to take a couple of blank sheets of paper for the last exercise.



Reflection Exercises

- ☐ **Journal.** Begin by writing about the past 90 days. Take as much time and space as you need. What happened? Were there any major events? How did you feel?
- ☐ **Accomplishments.** Specifically, what did you accomplish over the last 90 days? What did you learn, create, repair, fix, achieve? List at least the top 5 to 10.

Personal Accomplishments	Professional Accomplishments

- ☐ **Setbacks.** Did anything go wrong or not as expected during this period? For each, identify something you could have done differently to avoid the setback or deal with it more productively.

Setback	Could have done differently

☐ **Lessons.** Did you learn any valuable lessons in work or life during this period?

☐ **Strengths.** Which of your strengths were used most in the last 90 days? Which were neglected?

Strengths Used Most	Strengths Used Least



Moving Forward

Annually. The first 3 exercises of this section are appropriate annually. If you have done them lately, skip to the 4th exercise, 90 day goals. If you feel that a development in your work or life warrants revisiting them, by all means do so.

- ☐ **Dreams.** What do you dream of for your life or your family? What are some of those “someday” actions, events, experiences that would help you feel you’d achieved your potential or experienced life fully? Job, education, volunteering, house, self-image, etc...

- ☐ **Long Term Vision.** Now let’s get an ounce more concrete. Envision your **ideal work day** 10 years from now. Be as specific as possible. Spell out your day from the time you wake up until you call it a day. (Remember, in 10 years, you can change everything!)

Where do you live?

What is on your agenda for the day?

What are your responsibilities?

Who are you with?

What relationships are different or better than they are today?

- **Shorter Term Achievements...**in the next 2 to 3 years ahead, what are some of the key moves or achievements that will begin to put you on a trajectory to achieve your dreams and/or long term vision?


Do you need to make or save more money? How much by when?

Do you need additional skills, experience, or education?

Do you need to develop new relationships?

- **First step: 90 day goals.** Now project just 90 days. What would you like to be different? Set 3 to 5 personal and professional goals for the next 90 days. For each, get specific. "I want to get from X to Y by when."

Personal Goals	Professional Goals



We are what we repeatedly
do. Excellence, therefore, is
not an act, but a habit.

Aristotle

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Action Planning

- **Current Actions.** If you have been using irunurun, review your personal scorecard. Which of your actions did you do most consistently?

Did your actions have a measurable impact in your work or life? If not, why not?

Which were least consistent?

What would have to happen for them to become consistent?

Did you rely on extra credit (overdoing some actions to make up for others that weren't getting done)?

Consider not using extra credit next quarter to get a truer read on your consistency. (i.e. only record an action up to the target reps)

- **Action Adjustments.** What action adjustments are necessary to shape your mind, body, relationships, time, and behavior toward your 90 day goals? For each, define a target frequency in days/wk or reps/wk.

CAPACITY	PRODUCTION
Breath (cardio)	Grow (drives top line results)
Agua (fluids)	Relationships (deepens relationships)
Lengthen (stretching)	Organize (keeps focused on priorities)
Anaerobic (strength)	Work (turning the crank, core activity)
Nutrition (eat, don't eat)	Think (grows your expertise)
Cleanse (mind, body)	Higher (special sauce, the extra 1%)
Energize (sleep, laughter, breaks)	

- **Extra Credit?** Time for some intellectual honesty. This quarter, does extra credit really make sense? In other words, is doing more than the target number of repetitions or days really advantageous and worth rewarding?

For any actions you decide **would** benefit from extra credit, add “(EC)” to the action title and continue recording progress over and above the target frequency. For all others, stop recording progress in the app once you have achieved the target number of repetitions or days.

- **irunurun.** If you would like to participate in our next quarter’s performance challenge, email me your action selections and target frequencies. You can choose to participate on Capacity, Production, or Both. (Let’s do this!)



Accountability Plan

- ☐ **Obstacles.** What is standing in the way of you pulling these changes off?

What, if anything, do you need to change about your schedule, work environment, sleeping habits or environmental factors to make these actions more likely?

Is there anything at work that is hindering your performance?

- ☐ **Accountability Plan.** How do you plan to stick to your commitments and behavior change plans?

Who would best hold you accountable? Will you ask them to let you report your progress on a weekly basis this quarter?

Could you invite them to join you for some or all of these changes?



Annual Letter

- **Write yourself.** Okay, it's probably been a long day, but before it is through, finish with an important exercise. If this is your first PQO or if it is the last PQO of the year, write yourself a letter about what you'd like to achieve this year and change in your work and life. Seal it, and send it to me. I promise not to open it. Next year, I will send it back to you. What do you want to tell your future self about your hopes and dreams for this year?