



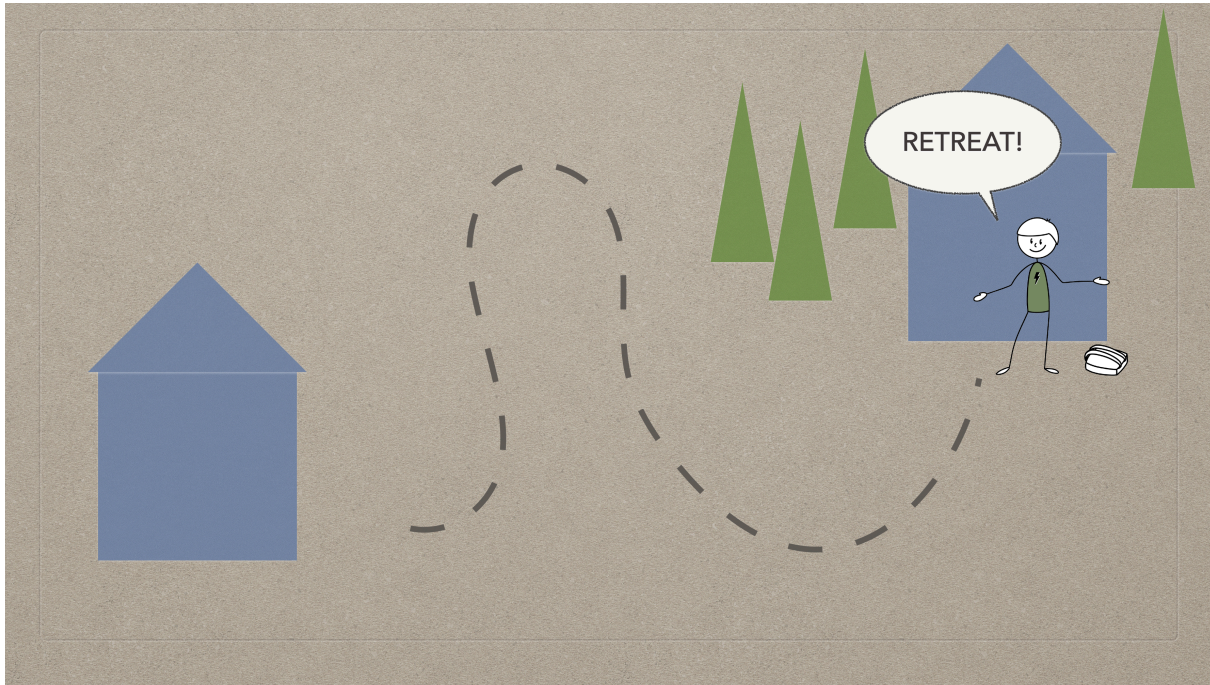
# Personal Retreat

Get Away and Get Some Perspective

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Personal Retreat Video

Congratulations! You've decided to give your maker self a few days off and instead indulge your manager-self free reign to examine, judge, and help you get better. This is a big commitment that will pay dividends.

This PDF explains one way to have a personal retreat and also includes links to some other resources and even some worksheets to use on your retreat. So let's get started!



## Take It Seriously. Go Somewhere Else

This retreat is important. The problem with staying in your usual workspace is that it is where you usually work. It will be super tempting to spend your retreat things doing the same things you do every other day. That won't work. If you want to pull this off, you need to get away. Ideally, get yourself some accommodations at a place where you feel comfortable and isn't too busy. Two nights is ideal, so you have a full day in the middle and half days on either end. You're going to need all that time.

# What You Should (And Should Not) Bring Along

Make yourself a packing list.



## What You Should Bring:

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- Some clothes, but not a lot. You're going to work, not party.
- Food. Bring enough food that, if you get rolling, you can eat on premises without leaving to get food and interrupting your flow. I bring granola bars, some fruit and vegetables, and fixings for one nice meal that I cook at the end of the full day.
- Some Technology, maybe. You'll be doing a lot of writing. If you are comfortable doing that with pen and paper, that may be best. If you prefer writing with technology (I do), you need to be honest with yourself whether you can treat that technology as a writing device and not a distraction device. If you think you'll be too tempted, bring a laptop or iPad with the cellular and WiFi antennas turned off.

## What You Should Not Bring:

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- Distractions: Leave gaming devices, books, and anything else you use to distract yourself at home usually. To work, you need to stay focused throughout the retreat.

# Planning Retreats are All about the Manager, Not the Maker

I've got this theory that nearly everything we do falls within one of three general categories. We make. We manage. We consume. For a lot of us, we spend a lot of time making and not enough time stepping back to make sure we are marching



in the right direction. The planning retreat is an opportunity for the manager to take control for a few days and look at things with some perspective. Remember throughout your retreat that you there as a manager, not a maker. The maker gets to take over again when you return.

## Start with Roles

Start your retreat by looking at all the roles you fill. In my case, that is husband, father, brother, uncle, friend, co-worker, MacSparky, and attorney. There are also more internal roles, though like a student and a healthy and spiritual human. I have a whole list. You should too.

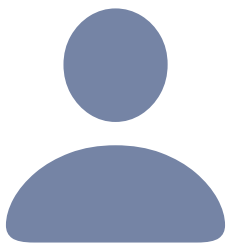
You'll be tempted to limit your roles to just your job or perhaps even a single project. That's wrong. Look at your whole life. Everything's connected. You need to look at the whole enchilada.

Once you figure out those roles, spend some time thinking about how you'd like to live up to those roles. What kind of husband do you want to be? Starting by setting that ideal version of yourself in each role gives you context as you work through the retreat.

## The Big Questions

Once I've sorted out my roles, I then ask a series of questions for each role. I've got some of these questions from talking with friends and the additional resources listed below. I've come up with some on my own. You should work through this list too, but also consider what further questions make sense for you.

The purpose of these questions is to let your inner manager drag your brain through the painful process of scrutinizing your motivations, values (as demonstrated by your actions), and surface those things you've made a priority in your life. Then you need to compare those things to those idealized roles in your life and face the music. You'll find that your



### ROLES

1. Husband
2. Father
3. Brother
4. Friend
5. Writer
6. Attorney
7. Student
8. ...

actions and intentions sometimes are going in different directions. That's okay. We all do that. With these questions, you'll have the rare opportunity to realize this and make corrections.

Getting through the Big Questions for the various roles in my life took an entire day. It was grueling, but at the end of the day, I had a lot more insight into where I've been (and where I'd like to go). So here are the questions I ask for each of my roles:



## TOUGH QUESTIONS

### **What About This Role Brings Me Delight?**

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The good news is that the roles you are filling in your life are there for a reason. All of the roles I fill bring a great deal of delight to my life. (If they didn't bring any delight, that raises a whole different set of questions.) Regardless, part of the review should be identifying what specific parts about that role bring you delight. You'll be surprised. One of the things I learned in my recent retreat is how much I love learning from my children. They are older now, and they have this vast wealth of knowledge and experience. I love it when they share some of that with me.

### **What About This Role Brings Me Dread?**

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Not everything is sunshine and roses. For most roles in your life, some parts are not delightful, but quite the opposite. When we are wearing our maker hats and grinding through day-to-day, we usually don't question these sources of dread but instead, get through it. With your retreat, you can stop and identify these things. We can turn them over in our minds and start giving thought to how we make them better. Maybe we change the workflow. Perhaps we find a way to delegate them to someone else, or maybe – after reflection – we realize these dread-givers aren't as important as we thought, and we can chuck them overboard entirely. Dedicated time to identifying and considering these things is what this retreat is all about—question everything.

## **What (or who) Am I Undervaluing?**

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While you are working through the retreat's mental jujitsu, consider those people, ideas, and options you are undervaluing. There are people and things in your life that can help you if you'll stop and think about it. One insight from my last retreat was how much I'm undervaluing my virtual assistant. She's probably smarter than I am. I wasn't giving her enough interesting work.

## **What Should I Keep Doing?**

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Some things are working. Figuring out what those are and recommit.

## **What Should I Be Doing More?**

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Some things are working better than others. Find those things and make time for them going forward.

## **What Should I Stop Doing?**

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Things will surface that don't make sense to manager-you. Why are you spending 3 hours a month, generating a monthly sales report that could be done by someone else? Why are you spending 20 hours a month in front of the TV but only 15 minutes a month talking to your sibling? A personal retreat comes with a reckoning. As you get in deeper, you will find things that you should rightfully throw overboard.

## **What Should I Put on Hold?**

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So much of the battle for focus is lost with multiple priorities. Indeed, the word "Priority" is supposed to be singular, not plural. The answer isn't abandoning all but a single worthy project. Instead, pick the one for right now and put everything else on hold. There will be time for those other great ideas, just later, not now.

## Taking Action



As you get toward the end of the retreat, you're going to be spilling over with ideas. The next trick is turning those ideas from something that warms your heart into something that changes your life. My goal is not to leave the retreat until I've incorporated all the things I want to add, change, and remove into my plans. I spent the last evening and the last morning of the retreat adding repeating tasks to my task manager, writing emails to co-workers, figuring out new projects and goals, and putting together all the various digital and analog hooks and reminders to make the investment of the past few days pay off.

## Closing Ceremonies

I have a few things I do at the end of a personal retreat that I like to think of as the Closing Ceremonies:



1. Review My Roles, One More Time Since the process starts with a deep dive into my roles, I like to finish with one more review of my roles. By the time you're at the end of a personal journey, you've got a lot more comfortable with those roles, and looking at them one more time often brings just a bit more insight.



2. Let the Birds Loose During the retreat, particularly towards the end, as I start to think about turning ideas into action, I begin drafting a series of emails off to co-workers and friends. They all sit in my Drafts box until this point, as I often find myself going back to these drafts and revising as I go through the process. The very last thing I do before leaving a retreat is send off those emails like a flock of messenger birds. I love the idea of my retreat already having an impact before I even make the drive home.

## Staying Honest

I also schedule a review of my retreat writings and action list a week, and then a month after the retreat. The big fear is that you'll get back into maker mode and not put any of those great retreat ideas into practice. Checking back keeps you honest.

## Some Additional Retreat Tips

### **Nothing is Linear. Everything is Connected.**

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The process is not linear. You'll find your thoughts jumping around between questions and roles often. Don't fight that. Just roll with it. You can always go back later and pick up anything you missed.

### **Your Brain is Nimble. Make Sure Your System is Too**

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However, you go about recording your retreat thoughts, make sure you have an easy way to do so. Because the process is not linear, you'll be jumping around a lot. If you are doing this with pen and paper, make a separate page for each role. On a computer, a good outlining tool can help.

### **Multiple Passes are a Must**

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Start at high altitude. Get lower and more detailed with every pass. Don't stop until you can see the dirt.

### **Don't Be Too Clever**

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If you need a new analog or digital system to solve a problem, the retreat is not the place to create that. Write it down. Schedule time for it later. Don't waste precious manager-retreat time in the weeds.

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## Prepare to Be Exhausted

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When you finish the retreat, you'll be tired. Don't plan for a bunch of work on that day you return.

## Additional Resources

Here are some resources that helped me get started.

Ian Byrd wrote an excellent post about how he does his retreats.

Mike Schmitz has a video course that goes deep on personal retreats.