
Dare to Dream Annual Goal-Setting Retreat Instructions



Get Away

Your world is full of distractions, making it easy to get caught up in all the noise. It can be challenging to focus on your goals and find the space to proactively set goals for the future with your significant other. As you embark on your career as an attending physician, integrate into normal humanity, and often start your family life, it's common to be reactive. To achieve true success, it's essential to have a clear goal in mind and know how to stay focused.

There are numerous ways to escape from all the noise and concentrate on both your personal and professional life. One of the most effective methods is to carve out a space for yourself that is free from distractions. By doing so, you can fully immerse yourself in your retreat without any interruptions or distractions hindering your focus.

Arrange for uninterrupted time with your spouse or significant other. If possible, an overnight stay away from home gives time for good ideas to surface.

Involve Your Spouse

I agree with the Prudent Plastic Surgeon that physician couples should share their finances and with that in mind, this goal-setting retreat should inclusively both members of the household. Of course, if you are single it's a little less complicated, but the value of the retreat is still critical.

In the early years of our marriage, my wife and I used to rely on our parents to watch our kids for a 24-hour trip to downtown Chicago, which is 2 hours away from our home. During these trips, we would take the opportunity to indulge ourselves, have meaningful conversations, dream together, set goals, and work on our annual budget. Goals and finances are often interconnected, and it was important for us to align them during these trips.

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Use A Guide

We use the same self-guided questionnaire that I developed for this annual retreat. It is called “Dare To Dream” and you get a [free copy here](#). As the years have passed and our finances have become more complex with our family of seven, we have had to gradually extend the time away to 48 hours, and then it increased to 72 hours and beyond.

Expense It Out

Fast forward to the present, with 9 businesses going on top of all this, and it takes a full week for us to sort through our “Stillson Enterprise” and prayerfully discuss personal/family/business matters as well as create each of the associated budgets. The nice feature of this is the week away is now covered as a business expense rather than a personal expense. As you hear me say all the time, this is just another [nice aspect of having your micro-professional corporation](#).

Retreat Preparation

As As you prepare to get away, especially if this is a new process, you as a couple will find it helpful to spend some pre-retreat time in mindful reflection and prayer about your lives. My wife and I pray together nightly, so this is pretty easy to integrate into our natural flow (by the way, they are not long prayer sessions). I also enjoy running, so spending some time in prayerful meditation comes naturally to me. Regardless of your rituals and routines, take some time to prepare yourself for the retreat as it will make it more productive and enjoyable. For instance, this preparation process would allow my wife and me to use the two-hour drive to Chicago to discuss the questions guide. If we were efficient, we could complete the budget before reaching Chicago. Then, we could relax, explore the city, and leisurely continue to process and discuss any elements that require additional time to reach a consensus together. Indeed, the physician half of the couple often influences these conversations with their all-consuming job requirements.

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However, each member of the couple is equally valuable and deserves full consideration of their needs and goals in this process. For stay-at-home spouses-loved ones in particular there is the risk of being undervalued when paired with a physician. I certainly know when we had 5 children under 6 years old (yes it is possible), I had the far easier job of going to the clinic and hospital each day! The bottom line is that each person needs equally considered and valued in this process.

Use your preferred mindfulness techniques together throughout the retreat to help you remain present and focused.

Questions To Reflect On

Here are a few questions I recommend you consider during this goal-setting retreat. I suggest starting with a reflection on the past year, as there are usually insights to be gained that will influence your discussions about the future

- Review what you liked and disliked about the past year both personally and professionally. This requires some vulnerability but is a powerful exercise. I suggest you include reflections about your children, especially if they are in your home still.
- What do you and your spouse like and dislike about your current professional environment? This topic always seems to revolve around achieving a healthy work-life balance for us, especially in the medical field where work can easily spill over into our personal lives. I remember the days when I used to spend 2 hours working on electronic health records at home after the kids were in bed, just so I could be present for dinner and spend time with them. Fortunately, I have since developed more resilient habits that help me keep work, especially EHR tasks, separate from my home life much more effectively now. How do you manage administrative burdens like EHR?

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- How can your family become more connected this year? What areas need improvement? One of the most crucial bonding times we've found as a family is by making it a priority to have dinner together. Spending 30-60 minutes looking each other in the eye allows us to connect over the day's events. My kids especially love the "patient of the day" social story that I share, which is HIPAA-compliant. In addition to the dinner table, what other ways do you stay connected with your family, such as using a shared calendar?
- What activities do we enjoy doing as a family? Are there any special trips or activities planned for this year? Utilize your high income and resources to create family experiences that everyone can participate in. Research indicates that experiences hold more meaning than material possessions. Get creative and seek out activities that offer a blend of leisure and adventure.
- What do we want our lives to look like 10 years from now? This forces you to think with the big picture in mind. The Physician on Fire views this as a critical element of his [backward budgeting methodology](#). I happen to think he is right. Along the same lines, I like how the Physician Philosopher orients us to manage how we the end to look like with his [life planning guide](#) that focuses on the 3 Kinder questions.

Conclusion

When you do all of this together, you are making sure you and your partner are on the same page in life and with your finances. That unity will bring a feeling of peace and fill your love tank in a way just about nothing else will.

By doing this heavy lifting together, you will put yourself and your household in a position to proactively accomplish your shared goals.

With some curiosity, trust, patience, acceptance, non-judgment, and non-striving attitudes answer the questions on pages 5-6 together.

Questions

- What are we called to do with our lives? What gives us purpose and meaning?
- What do you and your spouse like and dislike about your current practice-professional environment?
- What does your ideal practice-professional environment look like?
- What are the personal or practice changes that need to occur to move you closer to your ideal?
- How can your family be more connected with each other this year? What are the areas that need refining?
- What do we want our lives to look like 10 years from now?
- What are some areas of personal development that we can help each other reach this year?
- What should we be doing to maintain/improve our health?
- What must we do to improve our financial well-being this year?
- How can we be better stewards of our resources this year? Consider making an annual budget to help you with this.
- How can we help our children thrive and reach their goals?

- What does your ideal practice-professional environment look like?
- What do you want or need to consider outsourcing this year?
- What do we enjoy doing as a family? Any special trips/activities this year?
- What do we enjoy doing as a couple?
- What should we say “no” to this year?
- What habits could we replace with ones that align better with our goals?
- What have we discussed that needs to be reflected in our annual budget?
- Review your routine. Ask, “What’s keeping us from our priorities?”

Needing more help? Consider downloading a free resource like the “Burnout Prevention Matrix” by Dike Drummond MD after to this exercise.