

SIX LIFE ARENAS

Life energy is really a simple concept. Even though you sometimes feel you have much less, you always have 100% of your life energy available to you. The question this exercise asks is “How much of your total life energy are you currently giving to each of your six life arenas?”

1. **First**, estimate the percentage amount of life energy you are giving in each of your life arenas and place that number in the appropriate box.
2. **Secondly**, study the numbers you have placed in the boxes and decide if this allocation of your life energy is really what you want.
3. **Thirdly**, place the new life energy allocation you would like in the six boxes labeled “Ideal”.

	PRESENT	RETIREMENT IDEAL
Career		
Family		
Relationships		
Self		
Community		
Leisure		
TOTAL:	100%	100%

In what ways do you think your retirement years will be a continuation of your life right now or will there be changes?

ASSESSING YOUR RETIREMENT ATTITUDE

Your retirement success depends mostly on how keenly you are aware, and how you deal with your attitudes and values. The following questionnaire will help you assess your own attitudes and values concerning retirement.

ATTITUDES

Stripped down to the essentials, attitudes are a set of beliefs that point you toward the actions they eventually take. Attitudes not only help shape your action but also determine feelings and expectations. Following is a brief inventory of attitudes which will give you an idea of your beliefs and expectations about retirement.

ATTITUDE ASSESSMENT

The following paired statements represent opposite ends of a spectrum of attitudes about retirement. Between each pair is a set of numbers from 5 to 1 which represent the strength of your agreement with one of the statements. If you circle 1 or 5, it means you agree strongly with the statement on either end. If you circle 2 or 4, it means you agree somewhat with the statement on either end. If you circle 3, it means you neither agree nor disagree with either statement.

I expect my retirement to be a very exciting period of my life.	1 2 3 4 5	As compared to previous stages, retirement will be very dull.
I'm looking forward to a lot of great opportunities after retirement.	1 2 3 4 5	Retirement is the end of opportunity.
I expect to call my own shots and be active and involved in lots of things.	1 2 3 4 5	Others will be telling me how to live my life.
Changes are openings to possibilities.	1 2 3 4 5	I wish things didn't have to change.
Life can be funny. I'm going to look for the humor in whatever I do.	1 2 3 4 5	There's nothing funny about retirement.
Retired people have a lot of advantages over younger folks.	1 2 3 4 5	Retired people are mostly disadvantaged in our society.
I'm looking forward to new friends of all ages.	1 2 3 4 5	No one is interested in my old stories.
Retirement is a great time to try some new ideas and take some risks.	1 2 3 4 5	Retirement is no time to be taking chances.
I'm in a position to be creative and make some contributions to society.	1 2 3 4 5	There's nothing left to give.
Maybe I can't run a 4 minute mile, but I can still have a good physical life.	1 2 3 4 5	I'm broken down and getting worse, why fight it?

INTERPRETATION OF ATTITUDE ASSESSMENT

Total the circled numbers and place here: _____

If your total is:

Under 29	Your attitudes will lead you toward a happy, rewarding retirement period.
30-39	You are somewhat skeptical, but are open to possibilities of contented retirement living.
40-50	You will need to develop more positive attitudes and approaches to the retirement phase of your career.

Leadership Transition Workshop Breakout 1: Centrality of Work Role



Table 3.1: Centrality of Work Role

Please circle the answer to the right of each question that most closely reflects your response.

QUESTION	Score to attribute for each answer below:				
	1	2	3	4	5
For how many years have you been in your current role?	Less than 5 years	5 to 10 years	10 to 15 years	15 to 20 years	Over 20 years
How many hours a week do you work on average?	20 or less	20 to 40	40 to 55	56 to 70	Over 70
How hard would it be to come up with something to do if you were suddenly presented with a day free from any work responsibilities?	Very Easy	Easy	I'd figure something out	Hard	Very Hard
How often does your work or company come up in conversations when you are not at work?	Almost never	Rarely	About half the time	Pretty regularly	Always
You check and respond to phone call, email or texts from work in the evenings, on weekends & on vacation	Almost never	Rarely	About half the time	Pretty regularly	Always
How many substantive interests do you have outside of work to which you regularly commit time and energy?	More than 5	3 to 5	1 to 2	1	0
How many good friends do you have that have nothing to do with your work life?	More than 5	3 to 5	1 to 2	1	0
If you had to introduce yourself without referencing your work, how hard would it be to come up with a description of who you are?	Very Easy	Easy	I'd figure something out	Hard	Very Hard
TALLY YOUR SCORE (number of responses per column times the allocated score)	_x 1	_x 2	_x 3	_x 4	_x 5
FINAL SCORE = SUM: _____	= _____ +	_____ +	_____ +	_____ +	_____

Based on the concepts from *Transitioning from the Top: Personal Continuity Planning for the Retiring Family Business Leader* by Stephanie Brun de Pontet, Ph.D.

Leadership Transition Workshop Breakout 2: Stakeholder Readiness Worksheet

Stakeholder: _____

Current 'readiness' for transition	NOT		NEUTRAL		FAIRLY		VERY
How are they currently acting			HINDERING		NEUTRAL		HELPING
What are their biggest concerns?	_____						

Stakeholder: _____

Current 'readiness' for transition	NOT		NEUTRAL		FAIRLY		VERY
How are they currently acting			HINDERING		NEUTRAL		HELPING
What are their biggest concerns?	_____						

Stakeholder: _____

Current 'readiness' for transition	NOT		NEUTRAL		FAIRLY		VERY
How are they currently acting			HINDERING		NEUTRAL		HELPING
What are their biggest concerns?	_____						

