Director's Forum

Planning an Integrated and Fulfilled Life

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Most pharmacy leaders are motivated by altruistic personal and professional goals. Pharmacy leaders want to develop departments that are patient-centered and optimize financial performance, quality, and safety in the medication use process. In addition, many pharmacy leaders want to give back to their communities; this may be in the form of volunteerism, service on leadership boards, or through philanthropy. Because of these many, often competing, personal and professional priorities, life can become chaotic. By taking the time and effort to think about their priorities and to create a comprehensive life plan, pharmacy leaders can integrate all aspects of their lives and achieve their aspirations. An integrated life plan will help the pharmacy leaders to conduct their personal and professional lives with purpose.

If you don't design your own life plan, chances are you'll fall into someone else's plan. And guess what they have planned for you? Not much.¹

There are a plethora of Web sites and blogs on how to achieve balance in our lives and integrate a variety of activities to lead to a fulfilled purpose. However, very few people document their goals in a systematic and disciplined fashion. In short, very few people have a *written* life plan that is designed to integrate all aspects of their personal and professional lives with the goal of having a fulfilled, purposeful life. An integrated life is one in which professional goals and personal goals are equally important.

The following case demonstrates how a pharmacy leader can move toward an integrated life. A 48-year-old pharmacy director was at a point of crisis. His work was overwhelming, and his work relationships were fraught with mistrust and negatively fueled by gossip. He was experiencing “burnout,” which was associated with anxiety spells and panic attacks, feelings of hopelessness, and low self-esteem. Further, the pharmacy director's home life was “lonely”; he had very little connection to his wife and 3 children. In a nutshell, his life was spiraling out of control. He met a colleague at a national meeting who suggested that the director develop a life plan to organize and integrate the activities of his life to focus on balancing work and home responsibilities, regaining trustful relationships, and reducing signs of stress. After consulting with others and reviewing Internet resources,

the director began documenting his life plan. It was painstaking work, but the pharmacy director took the time to examine his life, including his personal and professional choices. Following some basic principles, the pharmacy director developed a draft of his life plan. A trusted friend gave him some honest feedback. As a result, he began organizing his time to allow him to volunteer at his children's school and with their sports teams. He scheduled a “date night” once every other week with his wife and turned off his pager after hours. He planned a meal that he cooked once a week, preferably a favorite dish of one of his children or his wife. He organized his work schedule to allow him time to think strategically about his department. He learned to delegate more and hold his direct reports more accountable. He implemented an effective strategic plan that provided for enhanced roles of his staff. He did not openly discuss the changes in his personal and professional life based on his plan; he saw this process as deeply personal. Those he worked with and his family noticed the actions of his plan. His performance at work became more productive, and some bothersome somatic complaints also seemed to improve.

How many pharmacy leaders have had, or are having, similar experiences? A recent survey showed that nearly 60% of all health care workers experience burnout; a large percentage have an imbalance in their personal and professional lives.² Michael Hyatt, a well-known author and leadership expert, believes

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that every leader must change their attitudes about their life and its direction. He strongly encourages leaders to move from being spectators to becoming active participants in their own lives.³ His describes the development of a life plan as a way to put us where we want to be – and not just in a place where we end up after random choices and events.

There are many reasons why most people have not formally planned an integrated life. Designing a life plan requires considerable time; you must identify and then reflect on what things are most important to you and are most likely to result in an enduring, complete, and balanced life. Many of us are so busy that we don't have time to think about a plan, much less write one! Some people are afraid to think about the future. They are afraid of their own mortality or other possible failures. Some may make the process too complicated and thus become overwhelmed and lose momentum, ultimately leading to the plan failing.

Having a purposeful, integrated life plan is essential to being an effective pharmacy leader. The life plan demonstrates a leader's sense of purpose and organization – both of which, for example, are necessary for implementing a strategic department plan that achieves its goals. A life plan reflects a personal maturity that is also necessary for effectively leading a pharmacy department. In the process of developing their life plans, leaders have considered how they can best meet their work goals and how their work life can enhance their personal growth. This article describes the steps involved in developing an integrated life plan. Some resources are also provided to help this process. If you are bold enough to undertake and complete an integrated life plan, you will increase your potential to achieve fulfillment of your personal and professional goals.

COMPONENTS OF AN INTEGRATED LIFE PLAN

Stewart D. Friedman,⁴ in his book "Leading the Life You Want: Skills for Integrating Work and Life," suggests 4 domains as a framework for a life plan; these domains are work, home, community, and the "private realm" of mind, body and spirit. We believe there are 6 general domains that fit nicely into a cohesive way of thinking about the life plan. They are career, finances, relationships, use of time, health, and legacy. We describe each of these briefly and provide some context as to how they can be used as part of your life plan.

Career

There are multiple elements to be considered in this dimension of the life plan. Key questions about your career may include: What do I want to do in my life? Where do I want to live? What do I want to be known for in my profession? What areas of my work do I like? Or dislike? When do I want to retire? For a person who is relatively young in their career, questions and planning may focus on making an appropriate job choice; a more senior leader may contemplate at what level they want to finish their career and link these ideas to the legacy portion of their plan. Another important consideration may be what difference you want to make in the lives of the people you serve every day.

Randall Hansen⁵ provides tips on successful career planning; these may be helpful in exploring this part of the life plan. You should reflect on your likes and dislikes in your job, note your past accomplishments, define your strengths and weaknesses, identify transferable job skills, set career goals, learn about current job trends, and consider new training and education opportunities.

Finances

Sound financial management can provide adequate monetary resources to accomplish the goals of the life plan. Questions to consider include: How much money do I want to make? How much money do I want to save for retirement? For vacation and other discretionary activities? For charitable giving? As you answer these questions, you may want to hire a financial planner to help you manage your money and organize that portion of your life.

Relationships

This part of the plan includes your professional, community, and personal relationships. Think about the individuals in your life, including colleagues, peers, family, friends, acquaintances, and others. Choose an individual, identify their place in your life (eg, personal, community, professional), and then determine your goals for that relationship. For example, if you select your supervisor, or direct boss, your goals for that relationship may include completing a specific project with them, building a strategic plan with their guidance, and even deciding on the best method of positively influencing their decision-making.

Use of time

To make the optimum use of your time in the short term, you must set your priorities on a daily basis. Most of the time, we believe we have no discretionary time; however, if we carefully review all the activities in which we are involved, it becomes apparent that we have considerable discretionary time in every day, week, month, or year. It is relatively easy to develop a calendar and a process to set daily, weekly, or monthly priorities; but it requires much more discipline and thought to visualize how to spend time for a year or lifetime. This aspect of the life plan allows us to optimize the use of discretionary time to achieve our goals and objectives for a lifelong integrated and fulfilled life. Accepting the fact of our mortality may help us to think more productively about how our time can best be spent. When you acknowledge that you have a limited amount of time, you become more focused and realistic about your goals. You may not be able to achieve all that you want to in life, but you can set your priorities and create a plan for meeting them.

Health

Individuals in the health fields are often more aware than the general population of the benefits of a good diet, regular exercise, and a work-life balance. But even they may find it difficult to visualize a systematic long-term plan that is focused on health promotion and prevention. It is very important to start with initial steps in developing health plans that are attainable; an example may be to establish a routine exercise program in the work-sponsored gym or join a golf league in the summer months. More ambitious plans may be to hike down the trails of the Grand Canyon or canoe the US-Canada Boundary Waters. The health component of the life plan needs to take into account our increasing physical limitations as we age. This realization will encourage us to set priorities and develop a realistic plan to allow us to enjoy as many activities as possible.

Legacy

James McCallister III in his 2003 Harvey A.K. Whitney Award address acknowledged the importance of a person's legacy: "The notoriety of the legacy and the success that has been enjoyed over the years are through the collective efforts of those who adopt the vision, value, sense of purpose, commitment, and responsibility for maintaining that legacy."⁶ His lecture discussed the many ramifications of a thoughtful approach to a person's legacy, and we

recommend it to you. To establish your legacy, you must first establish a vision of your life and choose those things that you want to be known for. You must decide on your priorities and list achievements from those priorities that will establish your legacy. For example, a pharmacy director may have the following priorities in their life: family, job, and personal time. Therefore, the legacy plan may include the goals to establish a memory garden for loved ones, fund an ongoing scholarship at a local high school, and establish a family tradition that brings relatives together in celebration of a specific topic. The life plan legacy should be personal, but important enough to be recognized and remembered by others.

STEPS IN DEVELOPING AN INTEGRATED LIFE PLAN

A life plan doesn't just happen. You need to schedule time to review your personal and professional life and identify your goals and priorities. These steps should help you to grow the content in your life plan.

- *Get it in writing.* Set aside some time to actually write down your life plan. This demonstrates a real commitment to your plan and a purposeful approach to its content. Julie Morgenstern,⁷ a productivity consultant, wrote in a *New York Times* article that creating "to do" lists on paper is much more effective than other ways of keeping track of tasks. Morgenstern also recommends deciding on a single consistent system for creating and updating your "to do" list; the same applies to your life plan. You can write your plan in a journal or notebook or keep it on your computer or tablet. The format for the actual life plan can be a series of lists, a table, or even summary paragraphs. The most important point, however, is that it is in a format that you can understand and easily follow and track.
- *Allow several months to complete the first draft.* Do not attempt to complete a plan for the rest of your life in an evening or even a weekend. It will take much more time to consider all the components that need to be included. It will take 3 to 6 months to develop your initial draft, and then several more months to go back and review your document. As you think about your plan, you will begin to observe things around you that will change the nature of your plan. Allowing yourself adequate time for reflection and observation is critical to your plan's success.

- *Put all your thoughts in enabling, not restrictive, language.* Do not be constrained by the life plan and don't limit your possibilities. There will be many opportunities in life that you cannot foresee. Your plan should be framed to allow you to achieve the best possible holistic life, including the unexpected. For example, if you are considering where to accept a job, don't limit yourself by saying, "I want to live in California because of the nice hiking trails." Use enabling language, such as, "I want to live in a place with hiking trails that test the limits of my abilities and allow me the best view of nature."
- *Keep your plan private.* You should not share your life plan broadly with significant others such as parents, siblings, spouses, or partners; if you really need someone to read your plan, you can share with one or two close friends. Ask them if they are willing to offer some critique, as they may be willing to offer suggestions you may have missed. This certainly does not mean significant others are not included throughout your plan, but you should consider it to be your plan for you to try to live and achieve. It also does not mean that those closest to you won't be affected by your plan; they most likely will, and you will need to commit yourself to sharing your plans and generating consensus from loved ones about your goals.
- *Review the plan annually.* Taking the time to review your plan every year provides you with feedback on how you are doing, gives you a perspective on your achievements, and allows you to refocus your efforts.
- *Review and revise the plan every 5 years.* We seldom move through life on a straight course. It is a good idea to revisit your life plan every 5 years and make adjustments depending on any changes in your circumstances.

RESOURCES

There is a great deal of literature that can help you with the process of considering and creating an integrated life plan. See the **Appendix** for a list of some key resources. Take the resource of your time and invest it in examining your life and setting your priorities as a foundation for developing your life plan. Call on trusted mentors and friends to give you feedback as you work through this process.

CONCLUSION

Pharmacy leaders' lives can be very busy with many competing personal and professional priorities; their lives may become chaotic if they do not manage these priorities and goals. A life plan that requires careful and insightful thought about all aspects of life is a valuable tool. Taking the time and effort to write a comprehensive and integrated life plan can help pharmacy leaders to achieve the aspirations and goals of a fulfilled personal and professional life.

REFERENCES

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APPENDIX

Suggested Readings and Resources for Developing a Life Plan

- Life Planning Resources Web site. <http://www.life-planningresources.org>
- Michael Hyatt and Daniel Harkavy. This is your life: A proven plan to get from where you are to where you want to be. <http://michaelhyatt.com/life-plan>
- Bill Santamour. Embrace your imbalanced life. http://www.hhnmag.com/display/HHN-news-article.dhtml?dcrPath=/templatedata/HF_Common/

NewsArticle/data/HHN/Daily/2015/February/work-life-balance-blog-santamour

- Stewart Friedman. Work+Home+Community+Self. <https://hbr.org/2014/09/work-home-community-self>
- 18 questions that could change your life. www.qualtrics.com/totalleadership
- Preventing burnout. <http://www.helpguide.org/articles/stress/preventing-burnout.htm>
- 10 signs you are burning out – and what to do about it.

<http://www.forbes.com/sites/learnvest/2013/04/01/10-signs-youre-burning-out-and-what-to-do-about-it/>

- Life plan templates:
 - michaelhyatt.com/myresources/life-plan-template.doc
 - www.managetogrow.com/wp-content/uploads/.../Simplest-Life-Plan.pdf
 - kaohana.windward.hawaii.edu/pdfs/.../MyStrategicLifePlanTemplate.pdf ■