Retreat #1
Exercise Booklet

FALL 2023
This booklet contains seven exercises that we will use during your weekend retreat. We will instruct you on each as we go. Please do not jump ahead as we want everyone to do them at the same time.

**Friday**
Exercise 1. Ikigai.

**Saturday**
Exercise 2. Ethical Autobiography.
Exercise 3. Personal Values Map.
Exercise 4. Life Aspiration Statement.
Exercise 5. Your Life Story

**Sunday**
Exercise 1. Ikigai.

The Japanese term, Ikigai, has several meanings including your “reason for being,” “the process of allowing the self’s possibilities to blossom,” and “the reason for which you wake up in the morning.” The term compounds two Japanese words: iki meaning “life; alive” and kai meaning “(an) effect; (a) result; (a) fruit; (a) worth; (a) use; (a) benefit; (no, little) avail” (sequentially voiced as gai) to arrive at “a reason for living (being alive); a meaning for (to) life; what (something that) makes life worth living; a raison d’etre.”¹ It encompasses a balanced view of what it takes to achieve a fulfilling life. It includes four components: (1) Your interests or what you love, (2) Your strengths or what you’re good at, (3) Your contribution or what the world needs, and (4) What you can be paid to do (see below).

Figure 1a

Source: https://www.sloww.co/ikigai/

For some, these four categories do not carry equal weight or matter at all. For example, some people do not consider making money as part of their ikigai. For others, it doesn't have to be something that the world needs, or something that you have to be highly skilled or proficient at or something you have to necessarily love. Similarly, some suggest that you can have several Ikigais (see below).²

Nevertheless, these four conditions form a foundation for considering your calling or vocation in life. Please review Figures 1a and 1b, and then describe each component, rank them by priority, and reflect on insights that this exercise provoke. You will return to this exercise and explore that convergence through the coming weekend and indeed throughout your life. This pursuit never ends.

1. What You Love:
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2. What You are Good At:
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3. What the World Needs:
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4. What You Can be Paid For:

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How do you rank order the four components in importance?

_________  1. What You Love.

_________  2. What You are Good At.


_________  4. What You Can be Paid For.

What insights does the combination of the four parts of Ikigai provide regarding your calling?

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Exercise 2. Ethical Autobiography.

In this 3-part exercise, we look at your past. Part 1 challenges you to think about your past and answer the questions: When was I most alive? When did I most thrive? What are common features of those moments and what do they say about who I am as a person? To start, take a moment to briefly describe the three things that make you most happy on a daily basis. It is best to respond quickly and with the first answers that come to mind. Then, take another moment to briefly describe the three happiest moments of your entire life. Again, it is best to respond quickly and with the first answers that come to mind. What are the common themes/elements in the above two lists? What are the major differences? In the above lists, how many items were primarily based on having or using material possessions? How many were primarily based on being with people? How many were based on other factors?³

Part 2 challenges you to think about your past and answer the questions: *how did I come to be who I am as a moral person?* You will be asked to reflect on and document what have been the major influences on your personal ethical stance or perspective. *Was it your parents and family members, church and school, significant role models, friends, mentors, teachers and coaches, authors and books, movies and music, art and nature? Where did your biases or assumptions come from as you reflect on your moral experience?*
In Part 3, you will draw your Life Thriving History (see Figure 2 on the page 9), identifying peaks and troughs of high and low points through time. What was happening at those times? Are there any patterns? Have there been notable changes in your life and thought? When? Why? Was there any moments of major decision that brought on conflict or change, or any life crises that had shaken you? Have you had experiences in which you knew you used your gifts to make a difference for someone else? Have there been times when you knew you should or should not have done something and yet went against that knowledge? How did you feel later about that experience?
Figure 2: Your Life Thriving History

Level of Thriving, Being Alive

positive

negative

10

time
What insights do you have about your past happiness based on this examination?
Exercise 3. Personal Values Map.

In this 3-part exercise, we look at your present and challenge you to consider who you are right now. Part 1 looks at your values and how you order and prioritize them. As C.S. Lewis wrote, you have to put “first things first.” If you put them second, you will chase the wrong things. What are the strongest operative (as distinct from professed) values in your life right now? How have they come to be that? Who are the people who make you better than you are? Who are the people who bring out your negative qualities? Why? To whom or to what are you truly loyal? What do you long for? What do you fear? Where are you strong? Where do you feel weak? What brings you down and hurts you? What gives you energy, life and hope?

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In Part 2, we will use is called the **Wheel of Life**⁴ to analyze each area of your life in turn and assess what's in or off balance. The tool gives you a vivid visual representation of the way your life is currently, compared with the way you’d ideally like it to be. It is called the “Wheel of Life” because each area of your life is mapped on a circle, like the spoke of a wheel. There are numerous models. Here are two:

![Wheel of Life Diagrams](https://codescale.wordpress.com/2017/04/27/wheel-of-life/)

![Wheel of Life Diagrams](https://medium.com/@erictaussig/balancing-the-wheel-of-life-as-a-working-parent-d4b0c261b084)

Figure 3 is a circle, divided it into eight wedges. Name each wedge for a part of your life, such as work, relationships, health, finances, friends, family, fun, learning, personal growth, etc. For each wedge, highlight a dot to indicate how satisfied you feel about that part of your life. The innermost dot is 1 (low satisfaction), whereas the outermost dot is 10 (high satisfaction). Then, connect the dots across different wedges to create a “spider diagram” to get a sense of where you’re satisfied or dissatisfied, and which areas need more attention. For those areas needing more attention, write down three small steps you can take today to start improving those aspects of your life.⁵ This, in effect, represents where you are right now in your journey.

⁴ The “Wheel of Life” was originally created by Paul J. Meyer, founder of Success Motivation® Institute, Inc.
In Part 3, you will complete a 3-step **Values Inventory**.

**Step 1: Determine your core values.** From the list below, choose and write down (or circle) every core value that resonates with you. Do not overthink your selections. As you read through the list, simply identify the words that feel like a core value to you personally. If you think of a value you possess that is not on the list, be sure to write it down as well.

<table>
<thead>
<tr>
<th>Abundance</th>
<th>Daring</th>
<th>Joy</th>
<th>Preparedness</th>
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<tbody>
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<td>Acceptance</td>
<td>Decisiveness</td>
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<td>Accountability</td>
<td>Dedication</td>
<td>Knowledge</td>
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<td>Mindfulness</td>
<td>Resourcefulness</td>
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<td>Attractiveness</td>
<td>Excellence</td>
<td>Motivation</td>
<td>Responsibility</td>
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<td>Autonomy</td>
<td>Expressiveness</td>
<td>Optimism</td>
<td>Responsiveness</td>
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<td>Being the Best</td>
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<td>Benevolence</td>
<td>Friendships</td>
<td>Passion</td>
<td>Selflessness</td>
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<td>Boldness</td>
<td>Freedom</td>
<td>Performance</td>
<td>Simplicity</td>
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<td>Brilliance</td>
<td>Fun</td>
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<td>Stability</td>
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<td>Calmness</td>
<td>Generosity</td>
<td>Development</td>
<td>Success</td>
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<td>Caring</td>
<td>Grace</td>
<td>Proactive</td>
<td>Teamwork</td>
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<td>Challenge</td>
<td>Growth</td>
<td>Professionalism</td>
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<td>Quality</td>
<td>Thoughtfulness</td>
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<td>Safety</td>
<td>Understanding</td>
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<td>Commitment</td>
<td>Humility</td>
<td>Security</td>
<td>Uniqueness</td>
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<td>Compassion</td>
<td>Humor</td>
<td>Service</td>
<td>Usefulness</td>
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<td>Cooperation</td>
<td>Inclusiveness</td>
<td>Spirituality</td>
<td>Versatility</td>
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<td>Collaboration</td>
<td>Independence</td>
<td>Stability</td>
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<td>Consistency</td>
<td>Individuality</td>
<td>Peace</td>
<td>Warmth</td>
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<td>Contribution</td>
<td>Innovation</td>
<td>Perfection</td>
<td>Wealth</td>
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<td>Creativity</td>
<td>Inspiration</td>
<td>Playfulness</td>
<td>Well-Being</td>
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<td>Credibility</td>
<td>Intelligence</td>
<td>Popularity</td>
<td>Wisdom</td>
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<td>Curiosity</td>
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<td>Power</td>
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Core Values:

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Step 2: Group all similar values together from the list of values you just created. Group them in a way that makes sense to you, personally. Create a maximum of five groupings. If you have more than five groupings, drop those least important. See the example below.

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Values Groupings:

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**Step 3: Choose one word within each grouping that best represents the label for the entire group.** Again, do not overthink your labels. There are no right or wrong answers. You are defining the answer that is right for you. See the example below – the label chosen for the grouping is bolded.

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<td>Peace</td>
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<td>Trustworthiness</td>
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When you are finished, the list of values should roughly indicate the importance of the various values in your life.
What insights do you have about your *present* happiness based on this examination?

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Exercise 4. Life Aspiration Statement.

In this 2-part exercise, we look at your future. In Part 1, you will complete a Life Goal Inventory to help you examine your goals. Describe as fully as you can your aims and goals in seven areas of your life.

1. Career (goals in employment or career, situation aimed for)
2. Relationship with people (Goals with family, friends, colleagues, others)
3. Status and respect (Goals in your social circles; people from whom you seek esteem)
4. Leisure (Vacations, sports, hobbies, other interests)
5. Learning and Education (Goals for knowledge, skills, experiences to learn, areas to study)
6. Spiritual growth and religion (Goals for peace of mind, prayer, meaning, giving to others)
7. Material rewards and possessions (Goals for income, wealth, possessions)

List all goals that are important to you, whether they are fairly easy or difficult to attain. Be honest in this assessment; only then will the inventory be useful to you. Try to list in detail your goal statements (some long term, some shorter term). Include a statement of the goal that is specific, measurable and attainable and a time frame for attaining this goal. For example, if your major goal is to enjoy leisure satisfactions, indicate this, so as to better understand yourself. Describe two to five goals in each of the following spheres over the next five to ten years. The categories are a guide; feel free to change them to suit your own goals.

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Your Life Goal Inventory

1. Career (goals in employment or career, situation aimed for)

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2. Relationship with people (Goals with family, friends, colleagues, others)

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3. Status and respect (Goals in your social circles; people from whom you seek esteem)

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4. Leisure (Vacations, sports, hobbies, other interests)

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5. Learning and Education (Goals for knowledge, skills, experiences to learn, areas to study)

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6. Spiritual growth and religion (Goals for peace of mind, prayer, meaning, giving to others)

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7. Material rewards and possessions (Goals for income, wealth, possessions)

In Part 2, you will Write your Obituary. Take the year you were born; if you are male add 76; if you are female add 81. That is the statistical year you will die. Write it down. Imagine we are now at that date. If you were to look back on your life; what kind of life would you like to see? What would you like your obituary to say and where would you like your obituary written? Now, write it – Imagine it is written for the local newspaper by your best friend who knows the real you in addition to your accomplishments. What have you done with your life? What have you not done? If you, at that advanced age, could give yourself advice today, what would it be? How might you complete this sentence: I wish I had spent more time ________.
Your Obituary


What insights do you have about your *future* happiness based on this examination?

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Exercise 5. Your Life Story

This exercise brings it all together. Think of your life as having an arc and that you are in the middle of it. Where have you been, where are you now and where are you going? In the prior three exercises, you have described your past, present and future. What you have done is written your, as yet unfinished, life story. In this exercise, connect those three pieces into a coherent and interconnected whole in the form of a narrative or story. Students will work on that story and tell it to two different cohorts. This will be a challenging exercise; it is likely that you will feel the most vulnerable.

In the first narrative and cohort, you can simply tell what you came up with in the prior 3 sessions and brainstorm the story with others.

In the second narrative and cohort, you can refine your story and craft a narrative that tells it with more clarity.

Your cohort is encouraged to ask questions to help you understand deeper commonalities and themes, and how they help us understand who you were in the past, who you are today, where you are going in the future. The paper by Marshall Ganz in the Welcome Materials packet can help - *What is Public Narrative?* In particular, the “Story of Self” on pages 6 and 7 is directly pertinent, though the “Story of Now” and the “Story of Us” can also be helpful.
Narrative 2:

This is the most important assignment because it builds off the prior exercises, taking into account your past (how you got to where you are now), your present (where you are), and your future (where you are going). These three exercises, combined with your Ikigai form the foundation of what you consider to be your calling or vocation.

In writing your Personal Mission/Purpose Statement, shorter is best. A personal mission statement should be no more than one page that defines who you are as a person and identifies your purpose and your passion. It explains how you aim to pursue that purpose, and why it matters to you. Think about your life principles and goals. Why did you set these goals? How do your goals make you a better person? The mission statement should answer these questions in as much brevity as possible, so try to get to the heart of who you are and exclude unnecessary details. Don’t worry if your statement doesn’t mirror someone else’s—every statement is different because no two people are the same.

Your Mission Statement will have two parts. The first is few paragraphs that describe your calling or vocation. The second is one sentence that summarizes it. Some examples of this second part:

"To be a teacher. And to be known for inspiring my students to be more than they thought they could be." — Oprah Winfrey

"To have fun in [my] journey through life and learn from [my] mistakes." — Sir Richard Branson, founder of the Virgin Group

"To use my gifts of intelligence, charisma, and serial optimism to cultivate the self-worth and net-worth of women around the world." — Amanda Steinberg, founder of DailyWorth

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Your Personal Mission/Purpose Statement:

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Your one sentence summary:

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Exercise 7. Letter to Your Future Self.\(^8\)

For your final exercise, you will write a letter to the person you will be 1 year from now (you can also choose to write an additional letter to your future self in 5 or 10 years from now). \textit{What kind of person would you hope to be? What goals would you want to have achieved? What will be some of the challenges in living out this Personal Mission Statement in business school and business and did you overcome them?}

Think about your goals into the future. As you write your letter, you will start to think about the actions you should take to realize them in your expected time frame.

Subsequently when you open your letter down the road, you get to assess the things that match (or don’t match) up with your expectations and reflect why that’s the case. Oftentimes, our goals are subject to a lot of changes due to unanticipated circumstances and changing priorities. Reading your letter lets you see how your life trajectory has changed since writing it. It also makes you pause and think about how you are doing, and whether you are on the track or trajectory that you want to be in life. In addition, when you write your letter, your consciousness and thoughts are stored in your words. When you read it, it’s like you are being contacted by the old you. It provides you a different perspective and lets you see how much you have changed since then. So, as you write your letter, think about yourself now and yourself in the future as two different people. If it helps, think of your future self as a friend that you care about. Be supportive and challenging to that person.

How to Write Your Letter
While you can write to your future self for any time period, in this exercise we will use a one-year time frame. This way, it’s easier to envision your goals, and it also gives you a comfortable time frame to act over the course of your coming academic year.

1. Think about what you want to say to this future person? Some consideration points:
   - What do you want to be one year from now?
   - What are the goals and dreams you want realized by then?
   - If you can, be specific about metrics and milestones you hope to have achieved.
   - What is your desired status for the areas on your Wheel of Life, Values Inventory, Life Goal Inventory or Personal Mission Statement?
   - Did you anticipate any obstacles now and did your future self overcome them?
2. Once you’re done, sign off with your name and today’s date. Then, you can either
   a. Email the letter to yourself.
      • You can use Future Me (https://www.futureme.org/), The Self Club (https://theself.club/future-self/), or Letter to My Future Self (https://lettertomyfutureself.net/), all services that help you send your message to your desired email address at any point in the future.
   b. If you are uncomfortable using an external service (who has access to your letters, or what will happen to your letter if the service gets shut down), you can hand write or type your letter.
      • Print the letter.
      • Put the papers in an envelope. Seal it.
      • On the cover, write “To [Your Name]. To be opened on [Date].”
      • Set an appointment in your calendar to open your letter one year from now.
      • Put this envelope in a safe place where no one can access it.

In this coming year, work hard on your goals and vision! Then open and read your letter on its due date. Reading your letter from the past can make you more conscious of how you have changed versus the past, rather than just relying on memory. It can remind you of some of your past visions that you lost track of along the way, new visions that were set, make you appreciate how far you have come and make you look forward to the future.
This program is being offered to students at:

STEPHEN M.
ROSS SCHOOL OF BUSINESS
UNIVERSITY OF MICHIGAN

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