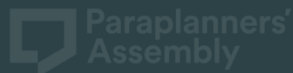


**If you're looking for a business  
and professional power-up for  
outsourced paraplanners,  
you're in the right place**



**Paraplanners' Assembly x Aegon**

This professional development Assembly is only possible thanks to the kind support of Aegon

# Welcome

# Your hosts



Sam Davies



Richard Allum

**Who you are**  
**Where you're from**  
**Why you booked**  
**What you'd like to get from today**

# Welcome



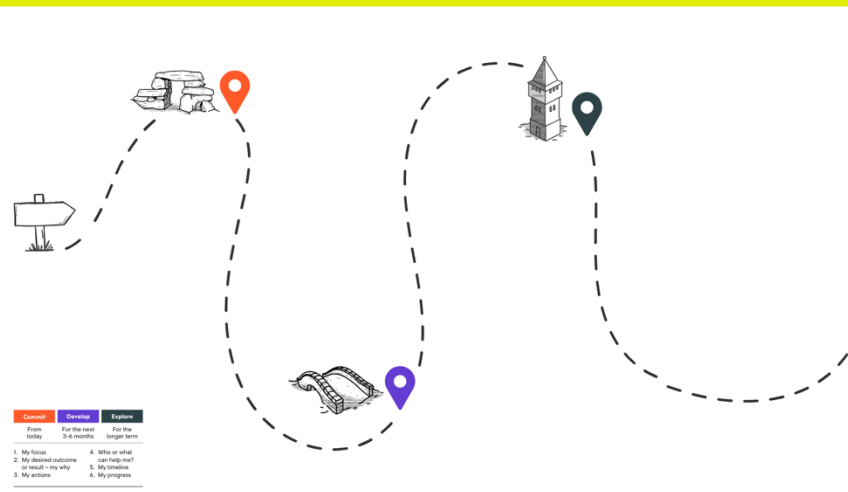
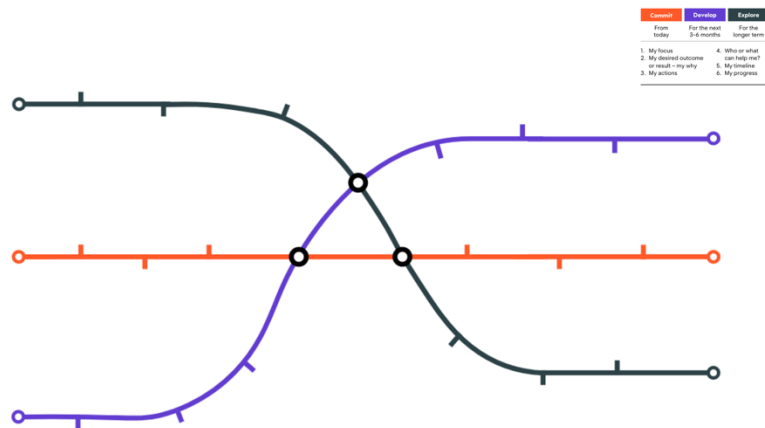
Rachael Hurdman

# Commitment Log

		My key reflection/s	My commitment	My action	My timescale	My progress
Session 1	Navigating the ups and downs of business					
	Make every work relationship count					
Session 2	Efficiency Boost					
	Smart Growth					
Group Discussions						

		My focus	My desired outcome or result (my why)	My actions	Who or what can help me?	My timeline	My progress
Commit	From today						
Develop	For the next 3-6 months						
Explore	For the longer term						

Commit	Develop	Explore
From today	For the next 3-6 months	For the longer term
1. My focus	2. My desired outcome or result - my why	3. My actions
4. Who or what can help me?	5. My timeline	6. My progress





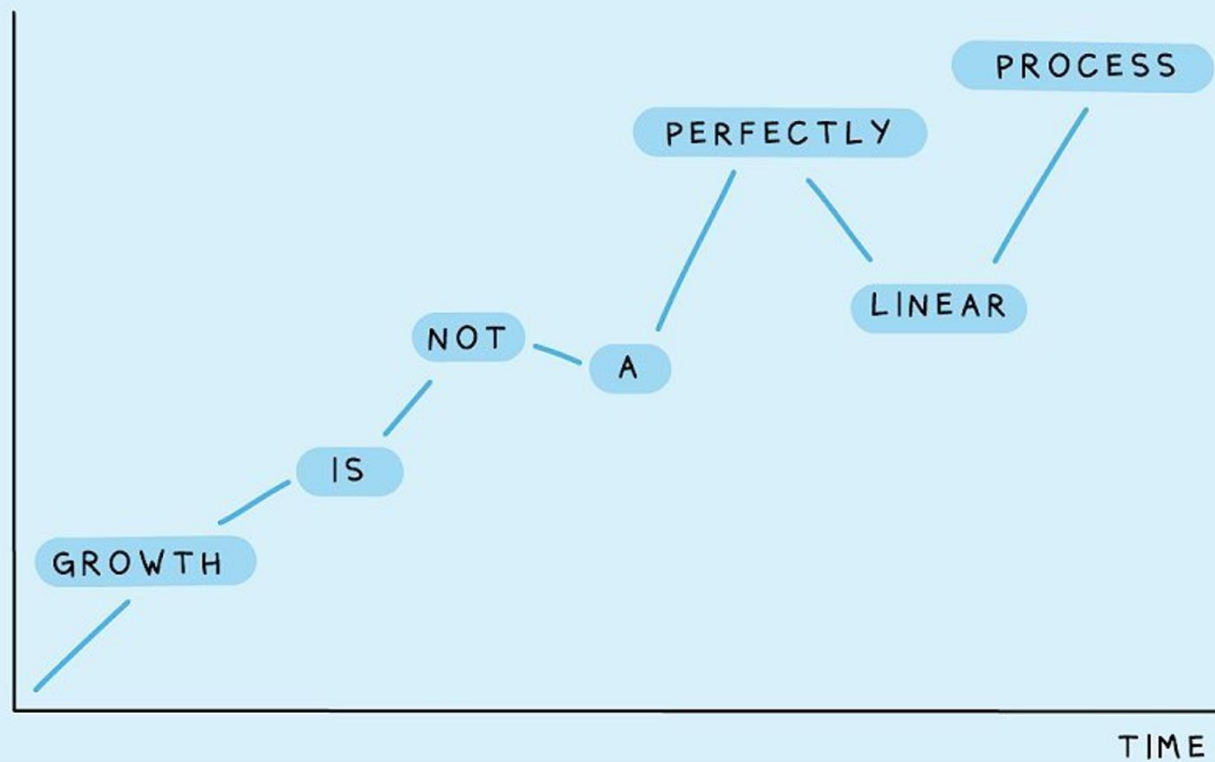
# Session One

How to navigate  
the ups and downs  
of business

1. Successfully navigate and succeed through the opportunities and challenges that are part and parcel of being in business
2. Identify how you can build and develop your resilience by sharing tools and techniques that you can apply yourself and share with those you work with
3. Explore the importance of your own mental fitness and apply simple strategies that you can use daily
4. Discuss the benefits of being flexible and adaptable in business and learn how to deal with ambiguity

Work with each other to share your own experiences and ideas

PROGRESS



**What are the ups and downs  
of having an outsourced  
business or being part of one?**

**How do these ups and downs  
feel and what impact do they  
have on you?**

# The 5 pillars of resilience



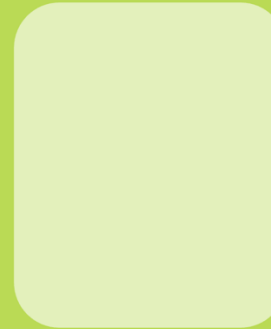
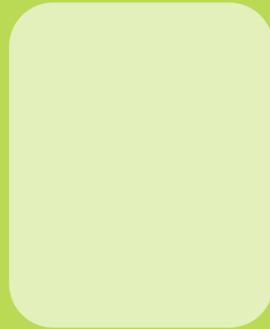
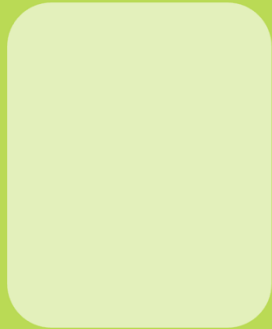
# RESILIENCE PYRAMID



# Resilience Time-line

Business/role  
start date

November  
2024



# Resilience Time-line

**Business  
start date  
2016**

**November  
2024**

Twins started  
nursery  
Eldest started  
school  
6 months – no  
invoices raised  
First invoice raised  
in 10/2016

Gained first  
retainer client  
Lost my Nan

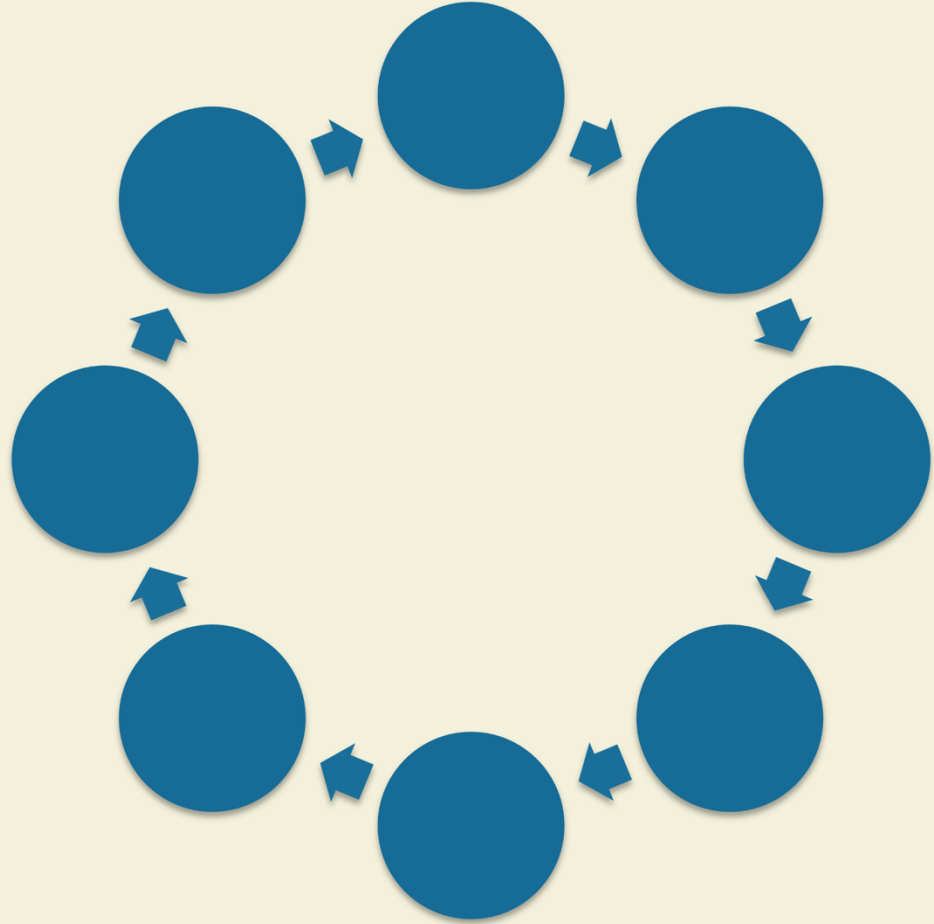
Covid19  
pandemic  
All face-to -face  
work cancelled  
Home-schooling in  
2020 - 2021

Winning 3-year  
Leadership  
Programme  
contract  
Built a Leadership  
modular  
programme  
Lost my friend at 40

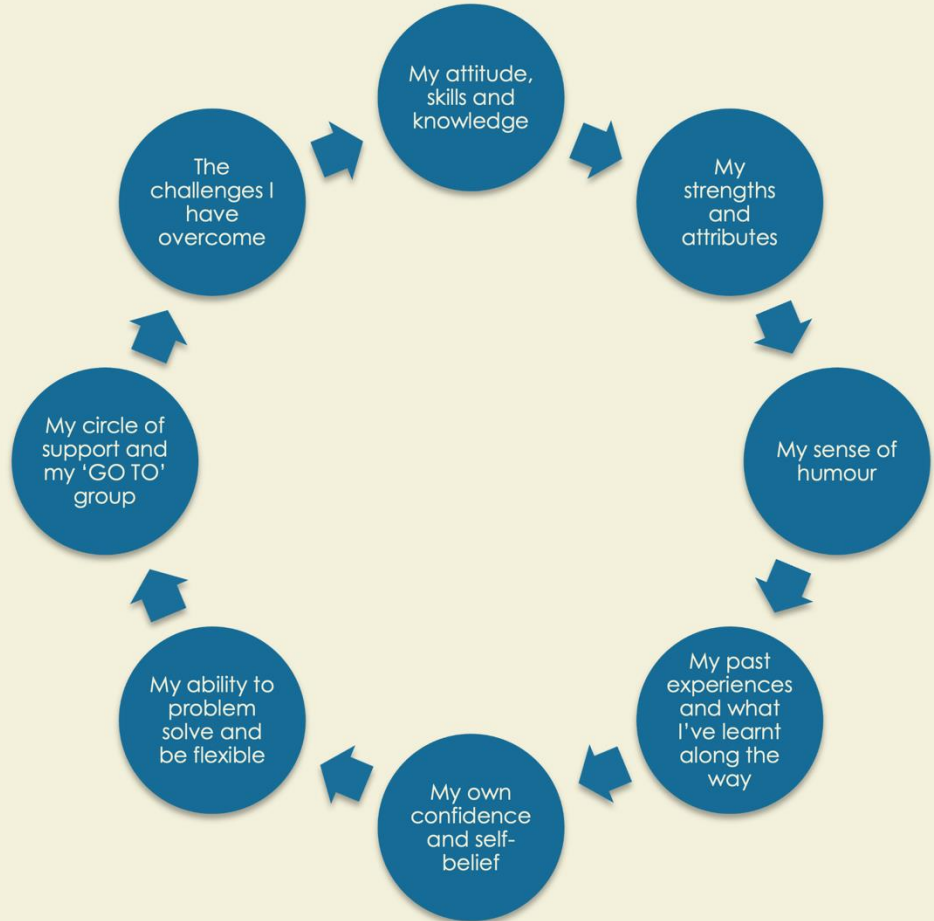
Eustachian ear  
dysfunction  
NLP Masters  
3rd Marathon  
training starts



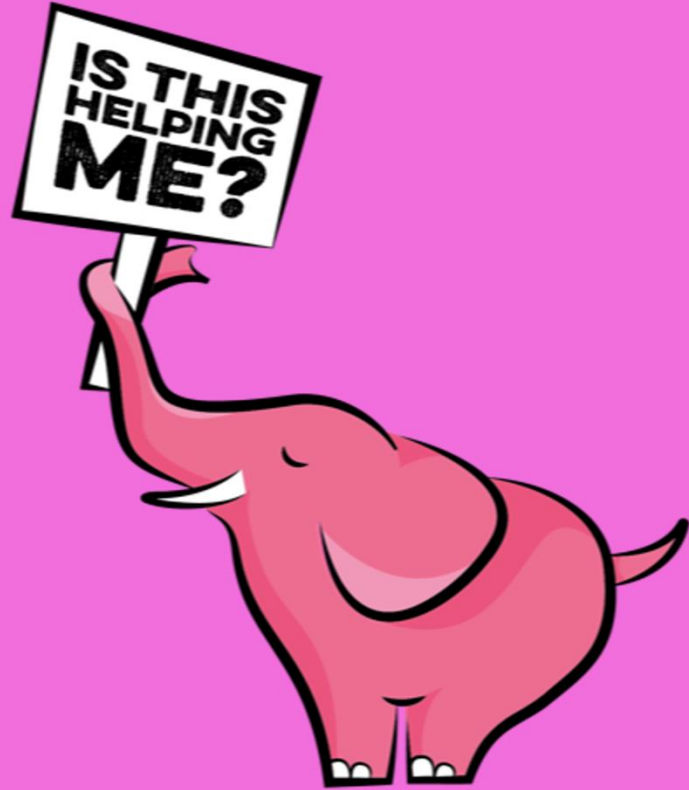
# My resilience sources



# My resilience sources



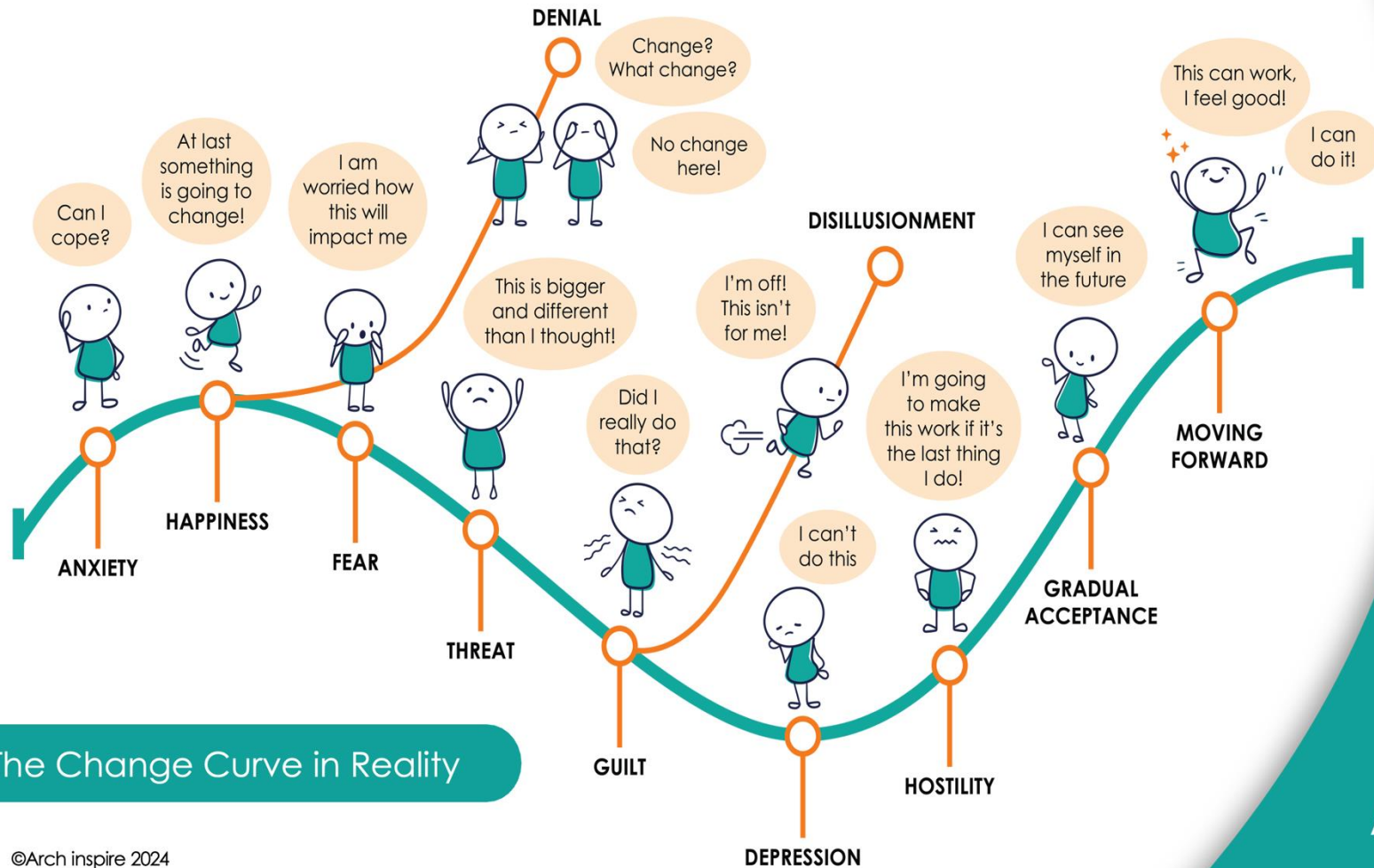
<b>Successes</b>	<b>What is going well?</b> Key successes, milestones and progress	
<b>Learns</b>	<b>What have I/we learned?</b> How has this helped you and/or others? How have you shared this?	
<b>Concerns</b>	<b>What is concerning me/us and why?</b> How can you help progress your concern? How can others help?	



1. The Power of 3 – 3 key wins daily (professional and personal)
2. Success/Learn/Concern
3. The Pink Elephant Paradox
4. Towards versus Away from language/thinking/feeling
5. Best case versus worst case
6. Reservoir of Resilience
7. Testimonials
8. Affirmations
9. Meditation and Breathing
10. GO TO's



**Be...  
flexible,  
adaptable,  
resilient and  
enjoy the grey**



## The Change Curve in Reality

Reflecting back on your journey, what  
advice would you give yourself at:

3 months...

6 months...

1 year...

3 years...

5 years in...?



# Break

## Session Two

Make every work  
relationship count

1

Identify the key relationships in your business – take your strong relationships to the next level and build upon the relationships that require work and improvement

2

Explore the key skill of Contracting and the Contracting template in order to use this with new and existing relationships

3

Identify yours and others' needs and requirements within your identified relationships – create healthy boundaries that benefit both parties

4

Identify your current level of assertiveness when working with others and develop your assertiveness agility with your identified relationship

**Work with each other to share your learning, experience and ideas**

1

Identify a strong  
relationship that  
you want to take to  
the next level



2

Identify a weaker  
relationship that  
you want to  
improve and build  
upon



3

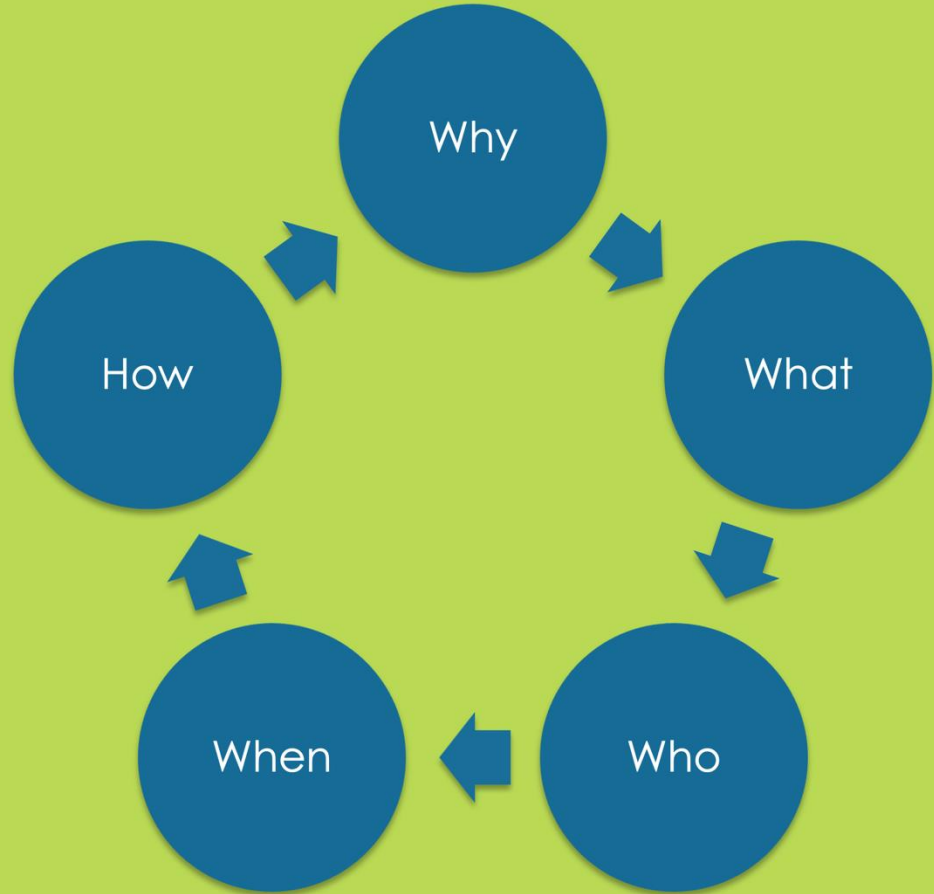
Identify the **why**  
for developing  
and/or improving  
each of your  
identified  
relationships



# Contracting

*'Entering into an agreement between two or more parties'*

A key skill for developing successful relationships, providing greater clarity around roles and responsibilities and helping you to communicate required and desired results more effectively.



# CONTRACTING

## WHAT

An agreement between two or more parties

Outlines key roles and responsibilities within relationships

Captures the purpose of the relationship, the core principles and processes which underpin it and the core elements of the relationship

A 'document' to be reviewed regularly

## WHY

To establish a trusting and strong relationship

To surface concerns and exposure, vulnerability and control

To check differing assumptions

To pay attention to relationship as well as task

To anticipate difficulties before they surface

To negotiate and align wants, hope and expectations around how you will work together

To set things up for success

## WHO

Your clients (new and existing)

Your team

Third parties

Suppliers

Your manager

Your leader

Project leaders/teams/contributors

Colleagues

Yourself!

## WHEN

At the start of a new relationship and on-going

At the beginning of key meetings

In meetings to discuss roles and relationships

In the 'review' process with existing clients

In goal setting meetings

At the start of projects and thereafter

In team meetings / 121's

## HOW

Explain what it is – find your own words - state why it is important

The relationship is 50/50

State clearly and simply what you would like, the reasons why - invite the other party to do the same - listen

Deal openly with questions/concerns

Acknowledge objections – deal with them and assert yourself appropriately

If/when you suspect low motivation address it

Summarise the agreement + document

# CONTRACTING TEMPLATE

## How we will work together

*The purpose of our working relationship*

*The core process / principles of our working relationship*

*The core elements of our working relationship*

## Guidance

- ▶ What we want to achieve and why (internal and external)
- ▶ What we want our impact with each other and our clients to be
- ▶ How we can achieve more by working together
- ▶ What we want our impact within the business / team to be

- ▶ How we are going to communicate clearly with each other
- ▶ The stages we both want to follow before / during / after speaking / working with each other
- ▶ How we will review progress (consider how often you will meet / speak with each other and how you will communicate with each other and other stakeholders to ensure the process is joined up)

- ▶ How we both want to support each other
- ▶ How we will feedback to each other (successes and issues)
- ▶ What we both require from each other to ensure a successful two-way partnership
- ▶ What each of our roles and responsibilities are
- ▶ What our expectations are of each other
- ▶ What each of our strengths are
- ▶ What each of our development areas are

# CONTRACTING TEMPLATE

## How we will work together

*The purpose of our  
working relationship*

*The core process / principles  
of our working relationship*

*The core elements of our  
working relationship*

## Our Agreements + Specific Actions



# CONTRACTING GUIDANCE

## WHY

Why are we here today in this meeting / discussion?

Why are we doing this?

Why will this make a difference to our clients / us as a team / a business?

Why do we care about this and why do we want to do this?

Why will this help us achieve our vision, mission and purpose?

Why will this help us to deliver great client outcomes?

## WHAT

What is the primary objective of this project / initiative?

What is the value to us / the business / our clients?

What will success look like?

What don't we know?

What do we know?

What are the objectives for this meeting / discussion today?

What difference will this make?

## WHO

Who is going to do what?

Who is responsible for X?

Who is accountable for X?

Who do we need to communicate with / keep informed?

Who is responsible for recording the actions and communicating them?

Who do we need to invite / add to this group / project?

## WHEN

When does this need to be completed by?

When do we need to start engaging / planning / informing others?

When do we want to meet / check-in to review / monitor progress?

When do we need to next meet?

When will we know we have succeeded?

## HOW

How will we measure progress?

How will we know we have succeeded?

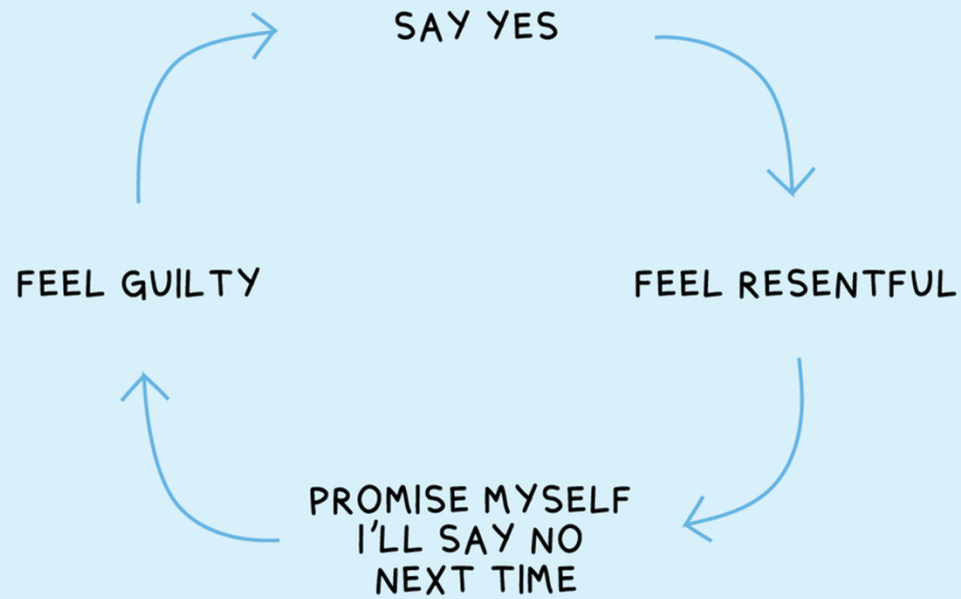
How much resource / budget do we have?

How will we review progress / successes / challenges throughout and at the end of the project?

How will we feedback to each other? – (give and receive feedback)

How will we measure success?

## PEOPLE PLEASING

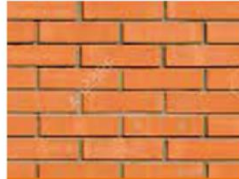


## THE PASSIVE/AGGRESSIVE/ASSERTIVENESS SCALE



### PASSIVE

- Emotionally dishonest
- Indirect
- Inhibited
- Self-denying
- Self-blaming
- Apologetic



### PASSIVE/ AGGRESSIVE

- Emotionally dishonest
- Indirect
- Self-denying at first
- Self enhancing at the expense of others



### AGGRESSIVE

- Inappropriately dishonest
- Direct
- Expressive
- Attacking
- Blaming
- Controlling
- Self enhancing at the expense of others
- Disrespectful



### ASSERTIVE

- Appropriately honest
- Direct
- Self-enhancing
- Expressive
- Self confident
- Empathetic to the emotions and needs of others



# Boundaries

## Professional

Respect

Time

Resources

Workflow

Prioritisation

'On versus In'

Delegation

Saying NO

## Personal

Respect

Time

Resources

Personal Priorities

Time for you

Balance

Saying NO

Your WHY



**How can you now  
use Contracting  
to develop your  
identified  
relationships?**



**What boundaries  
will you now put  
in place to  
benefit your  
identified  
relationships?**



**What first step  
do you want to  
take to build  
upon your level  
of assertiveness?**



# Lunch

# Topic 1: Efficiency

# Topic 2: Growth



# Break

# Topic 3: You decide

# Wrap up

**How will I make my  
learning from today fly?**



		My key reflection/s	My commitment	My action	My timescale	My progress
Session 1	Navigating the ups and downs of business					
	Make every work relationship count					
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	Smart Growth					
Group Discussions						



**‘Just three things’**

# Thank you!

Visit [www.archinspire.co.uk](http://www.archinspire.co.uk)

Visit [www.linkedin.com/in/rachaelhurdman](http://www.linkedin.com/in/rachaelhurdman)

**Nearly there...**



**If we did more days like today,  
what would you like to discuss?**

**Thank you!**



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