



## Embracing I.N.T.U.E.R.I

Being a champion is easy, becoming a champion is difficult; and as many of us learn, remaining on top of our game is a lifetime practice.

What is the difference between getting somewhere and remaining there, and how does it relate to finance or business? How did Warren Buffet become the Oracle of Omaha? How did Michael Jordan become a superstar? The answers lie in the fact that champions are created and live by a strategic process.

Strategy is the creation of a unique and valuable process to achieve goals under conditions of uncertainty. A champion consistently uses this process to perform activities more efficiently than his/her rivals; consistently re-evaluating the process to remain on top. The conditions of uncertainty are always changing so the player must always be ready to adapt. Strategic evolution is necessary to be successful in all aspects of life such as sports, finance, investing, parenting, and business development.

The question you must surely be asking yourself is where can I find this strategic process? What is this “magical elixir” that will help me or my business become more successful? The answer is both simple and complex - all champions have a coach or partnership that helps them discover and define their personal strategic process. The results are unique to each individual.

Here’s a look at The Intueri Group’s very own process, The SevenSteps. We have used it and will continue to use it to help clients create their own “magical elixir”. Remember - there is no one size fits all - it is all about customization.

## **IDENTIFY**

We think of this first step as the identification of intuition. This is a snapshot of the present; reality defined. Here is where we ask the foundational questions like, “Who are you?”, “Where are you?”, “What are you?”, and “How are you?”, “Why are you doing...?”, and even, “Why do you need help (from us)?” These are identity building questions that absolutely must be tackled on the journey to get to the truth. If you don’t know who you are, you run the risk of trying to be someone you are not.

The sooner the truth is uncovered, the faster the work can begin to assess and develop strategies to prevent current issues from becoming future catastrophes. Some people know what they want but need help efficiently identifying or allocating resources to get it; or managing risks that will keep them from getting what they want. Others need help in defining who they are and what they need.

## **NAVIGATE**

With a foundation secured, we turn attention towards prioritizing notions and nuances; identifying realistic, attainable goals, and separating them from whims and distractions. In the course of navigation, we must learn to let go of the things over which we have no control, and to stop waiting on wishes. For example, building a lottery win into your financial planning strategy is neither advisable nor realistic; nor is relying on untested assumptions to make critical decisions. A good navigator will rely on tools and techniques to plot a course and move forward. Documents, facts, time honoured/tested tools are your friend.

## **TRANSFORM**

With a realistic set of attainable goals now in focus, the destination is becoming clear and the physical/mental transformation may begin. At this point, we must look at different plans or courses of action, necessary to achieve defined goals. It is here that we take macro concepts and chunk them down into small, measurable tasks; identifying milestones and troubleshooting future roadblocks or challenges. Will you look different? Perhaps. Feel different? Quite likely. Right about now others will begin to notice something taking shape – an external sign that the internal battles are paying off.

## **UNDERSTAND**

Seek first to understand then to be understood (Covey). At this point, there has been considerable time and effort invested in pursuit of the “what”. Attention now shifts to analysis and review of the cost and opportunity cost, and the evaluation of alternatives related to each of the different plans or courses of action (defined in the previous stage). Realizing that there

may be multiple 'right' answers to the same question, it is important to ensure that we are able to say 'no' to the good ideas so that we can invest heavily in the great ones. We learn to link our beliefs and our actions to our Vision, even when it is difficult or seemingly impossible to do so. We strive towards a state of ever-clear, understanding not only what must be done but why. AH-HA!

## **ENTERPRISE**

It is time to transform potential energy into kinetic energy. Action plan in hand and implementation in full swing, the Enterprise step introduces the concept of the Strategic Advisor and beginning of the assembly of a strategic advisory team. The purpose of this team, whose number and makeup will vary by individual, is to work closely with you, offering insight, guidance, support, correction, expertise, mentorship, and more. The team function is to keep you headed true North; yours is to use them for this purpose and increase your peace of mind.

## **RECHARGE**

Steps one through five have exposed issues and potential pitfalls, uncovered goals, and formulated steps to mitigate risk and achieve future goals. However, a snapshot of reality and the potential challenges of the future isn't always the most desirable picture. The time and effort invested has brought with it high levels of anxiety. At a certain point, the more you put into something, the less you see in return; it's called diminishing marginal returns.

The sixth step is simple, and for good reason. Here we take a pause and check progress to date; rest, relax, and recharge knowing that solutions are being put in place. The aim is simply to recognize how far you have come, and to celebrate a new found peace of mind.

## **INNOVATE**

The last formal step on a never ending journey involves the implementation and scheduling of regular reviews to ensure action plans remain on track. Economic, social, political, and lifestyle changes make it necessary to adjust any future oriented action plan over time to keep goals and objectives on a course for success. Turning the steps into a cycle, we incorporate innovation and integration methodologies to strengthen the plan and to confirm the continued presence of the foundational truths, identified at the outset.

To hit a home run, to win the Super Bowl; both recognizable, easy to digest sports analogies. At the beginning of every business plan, investment, or game, the goal is to achieve success. Every competitor and team needs three things to be successful...a coach, a quarterback/captain, and a system or plan. The Intueri Group provides all three by way of our SevenStep process; customized solutions to help our clients find greater peace of mind.



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To have a deeper conversation about how this subject will affect your business, please contact:

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