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VANCOUVER CLUB LECTURE

FORMULATING A RULE OF LIFE IN  
BUSINESS AND THE PROFESSIONS

Great pleasure to be here in Vancouver, such a beautiful, vibrant city, a remarkable place, and, most importantly, for my wife, Linda, and me, the home of our dear friends, Jim and Rita Houston. When we arrived at the airport, I pulled out a Google map that confirmed the directions that Jim had given me to his house, I also rented a car with a GPS system so that I had a total of 3 resources to tell me how to drive to Jim's house (the map, Jim's instructions, and the GPS device).

*Roadmaps* are important for anyone in unfamiliar territory and even for some of us when we are in familiar territory. Without a road map, one may find it difficult to travel the right way to the appropriate destination. Or as Yogi Berra said, "You've got to be very careful if you don't know where you're going, because you might not get there."

I like Yogi Berra; he was a great athlete and a kind hearted person. His *intentions* were good. When you analyze some of his statements, you know what he intended to communicate. For example, we know what he meant to say when he said, "I didn't really say everything I said." His intentions were right; the words were not precisely correct.

Roadmaps and intentions -- these are the two topics I would like to talk briefly about today, and I want to talk about these topics in business and the professions and in a personal way.

The sudden economic downturn has preoccupied our global and local communications. Everyone seems to have less money. One young, unmarried attorney recently told me that he still wants a woman who will love him for his money, but now he wants her not to be very good at math.

In today's business and professional climate we are having some trouble, not just because of the severe economic downturn, but because we seem to have lost our professional way. Losing one's way in life is not something new. It has happened throughout history. In the beginning of the 14<sup>th</sup> century Dante wrote these opening lines to his *Divine Comedy*.

“Midway through life's journey,  
I awoke in a dark wood  
Where the true way was wholly lost.”

On a global basis, the financial and economic crisis that has enveloped the world is like a dark forest. The daily headlines describe a troubled and embattled world,

especially for the poor and the near poor. The downturn has disrupted families and created challenges in an already multi-challenged global community.

Some aspects of the legal profession appear to be in a dark forest. I am a lawyer by training so some of my discussion will be about law, but what I want to communicate applies to any business or profession comprised of what Peter Drucker calls “knowledge workers.” This includes almost all businesses, even academia, medicine, architecture, engineering, and investment management.

Larry Kramer, the Dean of Stanford Law School, recently echoed Dante in describing the present state of the legal profession saying that the profession brings to mind Rome in about 300 A.D. “On the surface, it looks grander and more magnificent than ever, but the foundation may be about to collapse.” In some ways, Kramer meant the comparison to Rome to be a joke, but then suggested that it may be closer to the mark than we would like.

Law firms are now global business enterprises with sometimes thousands of attorneys practicing in over a dozen offices throughout the world. The main driving force in these firms is to increase profits. Of course, profits are necessary for a firm’s survival, but the focus on increasing profits can at times diminish some of the values and characteristics that traditionally have been part of the ambience of a well managed firm. On balance, lawyers practicing in the larger firms are under pressure to increase billable hours. This pressure can disrupt the balance in their lives, for one’s ability to increase billable hours has limits.

Although law firm lawyers are under pressure to increase billings, the general counsels of their corporate clients are under pressure to trim legal costs. Consequently, they pressure law firm partners to keep bills down.

Lawyers have enormous work loads and hear a constant drumbeat to produce more work. Sometimes these workloads leave little time for mentoring and training younger lawyers.

For many young lawyers their experience does not seem professional and may even be demoralizing. Young lawyers often are not given individual responsibility of any consequence, but left to a diet of tedious work without significant input into a case or transaction.

Some of these issues are exacerbated by the advancement of technology and the remarkable growth in the number of lawyers. When I graduated from law school in 1969, the United States had about 250,000 lawyers, a bit more than one for every thousand U.S. citizens. Today, we have about 1.2 million lawyers in the U.S., approximately one lawyer for every 250 citizens. Some scholars have written about the “locust theory” of lawyers. A few grasshoppers are fine, but an ever increasing swarm of locusts seem to eat all the vegetation in sight.

I have even heard reports that the National Institutes of Health are considering using lawyers in their experiments rather than rats. The reasons for using lawyers are: 1) there are more lawyers than rats; 2) the lawyers take longer to figure out the mazes so the doctors have more time to observe them; and 3) the doctors don't develop the strong affection for lawyers that they do for the rats.

Yes, lawyer jokes abound in our society, and there may be some valid reasons why people like them (the jokes, not the lawyers), for all is not well in the legal profession of the twenty-first century. A critical indicator of the discontent among younger lawyers is that the largest 250 firms in the U.S., prior to the recession, were reported as losing 30 to 50% of associates after 3 or 4 years with half to two-thirds of the defections due to associate, not firm, choice. Many associates are saying no to the bargain of higher pay for more billable hours and a job that does not respect a work/life balance.

Lawyers, as well as many other professions and businesses, have found making a living to be more difficult and time consuming. But, again, this is not all new. Law practice presented similar challenges in the past. Oliver Wendell Holmes often asked lawyers how they intended to make out a fulfilling life when at times it might seem that law was nothing more than “the laborious study of dry and technical systems, the greedy watch for clients, the practice of shopkeepers’ arts, and the *manner less conflicts* over often sordid interests.”

Focus on Holmes’s phrase “manner less conflicts”. Here is where we can do something to reform professional life, not just in law, but in all of business and all of work. We have a role model in the British parliamentarian, William Wilberforce, who played a very significant role in the abolition of the British slave trade. You may have seen *Amazing Grace*, a very good movie about his life.

On Sunday, October 28, 1787, Wilberforce wrote in his diary, “God Almighty has set before me two great objects, the suppression of the Slave Trade and the Reformation of Manners.” We all know what he did with respect to the Slave Trade, but he also had a major effect on the reformation of British manners. By manners he meant something more personal than where one places a napkin when one leaves a dinner table. He meant a very personal, attitude of heart towards one’s fellow citizens that gave them dignity, honor, value, and compassion. He called the source of this attitude, practical Christianity, and wrote a book about it.

The reformation of manners in Wilberforce’s language required an inner change that transformed an individual into a more loving and caring person. In other words, the reformation of manners meant a transformation whereby one became a friend for others.

I can testify that the best law firm leaders I have known have “minded their manners” by becoming true friends to the persons with whom they work. They were friends to persons, not just in their own firms, but friends to clients, adversaries, judges, and even legislators. For younger lawyers these leaders supplied values and connectivity.

Many law firm leaders still lead this way, but in the profession at large the leaders need to create more of a climate that rewards mentoring, collegiality, and friendships. Fostering friendships and camaraderie leads to a more fully engaged and happier firm.

But what if one is not in a position of leadership and is overwhelmed with a workload coupled with little authority? How can he or she find a road map to help them foster friendship and gain balance?

One cannot do everything. To create balance one must determine goals and set priorities. Peter Drucker has written about the need in today's society for all knowledge workers to become responsible for their own goal directed behavior. All now need to become their own CEO about their lives and determine where they belong and where they can live a balanced life consistent with their values and goals.

Determining and setting goals can make an enormous difference. One of the persons I had the privilege of working with in the Ford White House was Peter Wallison. I was Nelson Rockefeller's White House Fellow at the time Rockefeller was Vice President and Peter was his counsel. Peter later became President Reagan's White House Counsel and wrote Nancy Reagan's favorite biography about her husband.

When President Reagan died, Peter and I met for lunch and talked about the strengths of Rockefeller, Ford, and Reagan. I asked Peter what was Reagan's best management trait. Peter said that one way to describe it was the phrase, "Lions don't hunt rabbits." By that he meant Reagan had set about 5 main goals for his presidency, and he wanted to focus on those goals. He did not want to be distracted by matters that other people were telling him were urgent and important.

Consequently, the first thing Reagan did every morning was to give all the rabbits that were on his Oval Office desk to his chief of staff, Jim Baker. He then turned his attention to his 5 main goals. Lions don't bother to hunt rabbits. They go after the big game that is most important to them. What is the lesson here for each of us? It is to define and articulate and then hunt our own personal big game. In other words, we need to ask ourselves what do we personally want out of life? This is an essential question for anyone who wants to discover a road map to find the way through a dark forest.

One method of reflecting on essential questions about one's life is the method developed by St. Benedict who lived about 70 years after the fall of Rome (410 A.D). He lived between 480-540 A.D. He was not himself a monk, but created a guide or Rule for the monks living in small monasteries at that time.

About 22 years ago I learned about the process of formulating a rule of life, drafted a rule for my goals and objectives, and attempt to modify the rule every year. I keep it on the front page of a leather business journal. So I look at the rule from time to time and try to remind myself of my goals and objectives.

I want to emphasize that I seldom follow my rule well, but the guide or road map is written in my journal so that I know its contents and can INTEND to follow it. We are flawed human beings and cannot even draft a perfect road map for our lives, let alone follow it well, but we can INTEND to ask ourselves significant questions about our lives and try to avoid wasting time hunting rabbits.

I want to outline briefly six steps one might use to formulate a Rule of Life.

1) First Step: Search for a meaningful scripture passage.

In the modified way I approach the formulation of a rule or roadmap, because of my faith, I first begin by searching for a scripture passage to be the overarching guide to my rule and, consequently, a main theme for my life.

The verse I chose was 1 Thess 5:16-18: “Be always joyful; pray continually; give thanks whatever happens; for this is what God in Christ wills for you.”

This is the verse that I write at the very top of the rule and memorize. I try to remember to say this verse as a prayer of gratitude from time to time. I often forget to do so, but my INTENTION is to remind myself of this portion of the word of God as often as possible and to do so with an eye towards the One who holds the universe together. Thinking about God as one repeats scripture turns repetition of scripture into prayer.

2) Second Step: Articulate your ULTIMATE GOAL.

Secondly, try to articulate the ULTIMATE GOAL for your life. I distinguish goals from objectives. Goals, as I am using the term, refers to abstract overarching concepts. The ULTIMATE GOAL is one’s North Star and one’s destination. It should be consistent with, but need not be encapsulated by, the Scripture verse one selects.

Objectives are action items that move one towards one’s ULTIMATE GOAL. They fit in the framework that one builds under one’s ULTIMATE GOAL.

To write one’s ULTIMATE GOAL, one needs to ask two questions: 1) What do I want to be? 2) What do I want to do? Think of the ULTIMATE GOAL in terms of your whole life. What do you want to be? What do you want to do? Stephen Covey in his book *Seven Habits of Highly Effective People* encourages his readers to think about their funerals and what they would like persons who played different significant roles in their lives to say about them at their funerals. I think it is a worthwhile exercise to try to help one identify what one wants to be and what one wants to do with one’s life.

Let me describe three hypothetical responses to the question: What would you want your best friend to say about you as he looked at you in your casket.

The first person could respond, “I want him to say that I was generous, thoughtful, and one of the city’s best doctors.”

A second person could respond, “I want him to say that I was a competent businessman who gave time and money to noteworthy charitable causes.”

A third person, in more of a Woody Allen style, might respond, “I want him to say, ‘Look, he is moving!’”

Actually, the exercise of asking how one would like his or her life described by persons who knew them well is a worthwhile method of exploring the questions: What do I want to be? What do I want to do?

Given my own personal spiritual commitment, I articulated my ULTIMATE GOAL as follows:

“My ULTIMATE GOAL is to know God, to abide in Him and allow Him to abide in me through Christ by the power of the Holy Spirit.”

It is an abstract concept with some implications for objective action.

3) Third Step: View your life in categories and develop action objectives in each category.

Ask: How does each thing I do contribute to my ULTIMATE GOAL?

Once we have an articulation of our ULTIMATE GOAL, we can reflect upon our action objectives in different categories of our lives. The process of breaking one’s life down into different categories allows us to see what practical actions could move us towards a fulfillment of our ULTIMATE GOAL. I also look for scriptural passages to serve as a guide for each category of my action objectives.

I know that we are whole human beings and that categories cannot cover all of our complex, integrated natures, but the discipline of addressing our lives in certain categories helps us reflect upon practical actions in our lives under the framework of our ULTIMATE GOAL. Personally, I use six categories for objective actions:

1. Spiritual objectives
2. Physical objectives
3. Community objectives
4. Work objectives
5. Study objectives
6. Recreational objectives

4) Fourth Step: Consider practical action examples for each of the objective categories.

I emphasize action in each of these objective categories by writing lists of infinitives (verbs). Do not try to write a perfect list of action objectives. Perfection in writing the Rule is an obstacle. Reflect and write. You will modify the Rule periodically. It should represent your thoughts and reflections, but need not be perfect.

1. Spiritual Objectives.

Scripture: "Abide in me and I in you."

- a. To converse with Him in conversational prayer without ceasing.
- b. To listen to Him by reading His Scriptures and tend to respond by praying the Scriptures and talking with God about His Word.
- c. To praise Him in song.
- d. To meditate on His Word and memorize and repeat His Word.
- e. To be still in His Presence.
- f. To realize His Presence in me.
- g. To contemplate Him.
- h. To allow Him to live in me and through me.
- i. To spend 1 hour/day in quiet time learning from Him, realizing His Presence and allowing His friendship to transform me.
- j. To live from the center of Christ in me out (inside out) not governed by external events.
- k. To partake of the sacraments as often as possible.
- l. To attain the peace of a life surrendered to Christ and the joy of sin forgiven because of the cross.
- m. To walk humbly with your God.
- n. To do all things to the glory of Christ.

Again, I want to emphasize that these are objectives. I don't do them very well. My *intention* is to do them well. They are part of the road map and part of my *intentions*, but I still often wake up in dark forests looking for the right path. However, with a Rule, I know have some guidance.

2. Physical Objectives.

Scripture: "Your body is the temple of the living God."

- a. To exercise frequently (aerobic and anaerobic).
- b. To eat a low fat diet and avoid sugar.
- c. To have a sufficient amount of sleep.
- d. To avoid too much television, especially television news
- e. To read medical literature that may benefit my body without catching "medical student's disease."

3. Community Objectives.

Scripture: "In quietness and confidence shall be your strength."

- a. To worship with a small group of friends.
- b. To create a lawyer's group to encourage attorneys in their faith.
- c. To have family vespers, retreat, prayers, readings, etc. regarding the family as the first and centermost place of worship.
- d. To stay involved in the wider community of faith in this country without moving frenetically among meetings.
- e. To participate in encouraging persons I meet in international communities in their faith.

4. Work Objectives.

Scripture: "Whatever you do put your whole heart, mind, strength and soul into it as into work done for the Lord, for your real employer is Christ Himself."

- a. To emphasize relationships in work and give genuine friendship to everyone with whom I work.
- b. To write a business plan that would allow me to control my time by controlling my own assets, time and money and rely on my own abilities while attempting to be of service to others, including colleagues, clients, partners.
- c. To give value for value.
- d. To engage in daily dreaming and planning time.
- e. To keep a focus on my business and professional plan.
- f. To listen well to others and care for them out of my own center in Christ.

5. Study Objectives.

Scripture: "Whatever is true and beautiful – think about these things."

- a. To read the wisdom of others, especially the ancient wisdom of those who have gone before me and draw upon their insights (e.g., Bonhoeffer, Augustine, Teresa of Avila, Phillips Brooks, Gordon Allport, Paul Tournier, etc.)
- b. To look for and read contemporary writers who are wise in their approaches to God.
- c. To understand the insights of science and the beauty of the artistic world.
- d. To look for timeless truths concerning contemporary issues.

6. Recreation Objectives.

Scripture: "Rejoice always, again, I say, rejoice."

- a. To play at games I enjoy – basketball, tennis, golf.

- b. To join in athletic events in community with persons of all ages, especially family and friends.
- c. To hike in nature, especially in Wengen (Swiss Alps).
- d. To dance and celebrate the remarkable nature of music and the beauty of coordinated movements.
- e. To laugh, smile and applaud the joy of living.

These action objectives are guides. I do not do them well. I do some of them some of the time. My *intention* is to do them well.

5) Fifth Step: Identify internal and external obstacles to fulfilling objectives.

All of the above objectives require time. One cannot do everything so one needs to act on priorities in allocating one's time. To try to set time priorities and to evaluate how well we are fulfilling our objectives, we need to identify the obstacles that hinder us from attaining our objectives.

Consequently, in writing a Rule of Life, the next step is to write an answer to the question: During the last 6 months what prevented me from fulfilling my objectives?

Ask this question under each of the six objective categories and write down the obstacles that you see, within yourself and in external circumstances, that impede the fulfillment of your objectives.

6) Sixth and Final Step: Write a practical daily and weekly example of how you intend to live.

After reviewing the obstacles, write a section entitled, "Practical Program to Follow Your Rule of Life".

In this final step you have two writings:

- 1) write an example of how a week following your Rule would look like; and
- 2) write an example of how a day following your Rule would look like (allow for interruptions).

For example, my writing for a day could be:

8 AM quiet time  
9 AM-6PM practice law  
7 PM family time  
9-10 PM study time

To reflect upon questions that necessitate an examination of the activities of our entire life requires a large quantum of time. Peter Drucker advises that we need 4-8 hours of consecutive time to think through major questions. I know that time is difficult

to come by, but not to take the time is like driving a car without a road map. Another Yogism, “Yogi, you are going in the wrong direction. Yes, but I am making great time.”

Isn't that the way we live our lives? We are so busy that we don't even bother to check our direction. We can't distinguish between lions and rabbits. We have to first find the North Star in order to be guided by it. Take the time to write your roadmap. Be like the man who said, “I always wanted to be a procrastinator, but never got around to it.”