

Fall 2023 BDA Business Planning Conference

Hosted by BDA Workshops (BDA group # 122319)

Our Fall 2023 BDA Business Planning Conference *is our last.*

Please note: Our steering committee is currently reviewing details and options for incorporating the service (income) planning — that is, planning through gross profit — into our service offering via the BDA Solvency Immersion Conference. We have already incorporated a deep and specific study of each BDA Tool together during each six-month solvency immersion. More details will be shared as they become available.

22 of us began the most recent cycle of the BDA Business Planning Conference, 14 of us are finishing the cycle, and seven completed surveys. We're considering that a 50% response rate.

During this conference cycle we:

Reviewed and shared on all twelve BDA Tools, with a recurring emphasis on BDA Tool Two.

Reviewed and participated in Q&A with TWO BDA members who presented their service (income) plans and goals documents from the previous (Spring 2023) conference cycle.

Reviewed and participated in Q&A with ONE BDA member who presented their actual 2022 results and plan comparison.

Reviewed and participated in Q&A with ONE BDA members who presented their first-ever annual business plan and FIVE BDA members who presented their annual service (income) plans, then had an opportunity to provide feedback in the form of support and encouragement.

... and much more!

We believe that BDA and the BDA tools, including annual business planning and much more, are perfectly suited for any solvent DA member who is responsible for generating an income in the modern world. That's most if not all of us. Please plan to join us for the next BDA Solvency Immersion Conference cycle. Registration is now open for our January through June 2024 conference to support our fellow members in getting and staying solvent, taking the 12 Steps in BDA, and immersing themselves in the DA and BDA recovery program.

We're keeping it simple this time, no images, just text. Enjoy your winter holidays!

Survey Questions — Part 1 — General

WHEN ASKED FOR RATINGS: 1 — Poor; 2 — Okay; 3 — Good; 4 — Great; 5 — Excellent

Do you have any advice to offer about improving the conference cycle?

Nothing beyond the items we have discussed on our weekly calls.

[**NOTE:** This comment is from one of our steering committee members. We have been discussing ways to integrate service (income) planning into the midpoint of the BDA Solvency Immersion Conference. We have already made room for deeper study of the BDA tools in the other conference, beginning November 1, 2023. This possible integration will be one of the primary topics at our two wrap-up sessions for this conference.]

No, I don't. — I thought the structure and the content were excellent.

I've really enjoyed — and benefitted from — the conference / workshops, particularly my work with 2 mentors to prepare my service plan, the fellowship in the group, and the study of the BDA tools. The flow worked for me; it was the right pace for me, and I'm grateful for Bob's warning about how much work a full business plan was and choosing to do a service plan. It was just the right-sized "bite" for me at this point.

Personally, it's mostly around logistics and timing for me — which I provide as more specific in the 3 things I would improve section.

Keep it going please!

About improving the workshops in general?

Have individuals attest that they have read the opening material before starting the workshop. To confirm that they know what they are getting into. → Know that even if individuals make the attestation will still have to address questions that the materials have answered, but it is a nice reference point to make and should allow avoiding “silly, pointless” conversations.

No.

I'm not clear on how this question is different from the first ... so my answer is there.

[**NOTE:** As the steering committee, we look at the conference cycle as the combination of the available workshops, in this case up to 20 workshops. The series if you will. When we talk about the workshops in general, we're more thinking of the format and structure of individual workshops and whether or not each two-hour workshop was worthwhile to our participants. Having said that, the answers above are perfect.]

No.

No. I love it. It's fantastic.

How were the spending plan templates — business and personal — and helpful guidance for planning pdfs?

1-5 rating plus comments: 4.7, 94%, A

Materials are clear and easy to understand. Easy to stay on task via following the materials.

Having a map of the steps for our process (two really, the templates and guidance) made it seem doable. Just having a place to start was really helpful, and they clearly reflect so much experience, strength, and hope. They helped me to build confidence in my capacity to complete my own [plan], and perhaps to help someone else in the future.

A little complex.

They were pretty straightforward, and I was able to quickly understand what was going into each of the templates.

Great!

I am sorry, I cannot think in numerical values. → Spending plan templates were excellent, and the pdfs etc were very good. The entire program is well thought out and has a very useful structure to follow through the weeks. I commend Bob for the time spent developing it, and the wonderful service he provides.

[**NOTE:** While personal gratitude and commendation are much appreciated, this is not a one-person service offering. Without the leadership and participation of our full steering committee — that is, Marc, Nita, and Bob — plus the service and participation provided by our fellow recovering debtors who join us, these recovery events and our other services would be much less useful and no fun at all.]

How were the workshops?

1-5 rating plus comments: 4.7, 94%, A

I like the organic nature of the workshops when there is open time.

And again, I don't know how to answer this differently from [question] #1 above.

Wonderful.

Generally, the workshops were very helpful, and I found it helpful to have a comprehensive look at the various tools of the program, only reason I put a 4 instead of a 5 is that it felt like it could have been shortened a bit.

Great! Even when unavoidable differences occur, people do inventories and work things through. That is truly the 12-Step spirit.

Very good. — (That is my overall feeling throughout, about the program.)

Through registrations for this event, we raised [\\$2,513](#) for outreach to debtors and provision of free conference-approved literature to anyone who asks. How did it feel to contribute to these DA and BDA service efforts?

1-5 rating plus comments: 5, 100%, A+

Have not thought about the question.

I really appreciated the focus in the orientation materials on being of service (as well as throughout) and having that concretized in dollars also feels great!

Great.

Very encouraging! Great to know that the work we collectively did also furthers the [threefold purpose] of DA / BDA.

Very great!

Very good.

Were there any sessions that stood out as your “favorites” or most productive for you?

I like the tools discussions and listening to business planning from a spiritual perspective.

I benefitted greatly from the in-depth look at the Tools of BDA and other members sharing their ESH [experience, strength, and hope] with them. This was a game changer for me.

It was really helpful to have business / service plan presentations from Marc and Cristi [and Matti] early on in the [conference], as I was getting started on mine. The combination of examples and my own work helped me to work with the template / guidance and integrate the process. I also loved the open share week we did; even though it wasn't part of the original plan, it gave me more opportunity to be of service than I'd experienced (since I'm so new to BDA), and also strengthened our community. Otherwise, I learned a lot from all the sessions.

I liked doing the tools and I loved the presentations.

The actual sessions where people were presenting their plans was actually my favorite part. Seeing Cristi's and Marc's plans were very encouraging, showing where things can eventually go.

Yes. The individual sessions and the presentations of long-term participants [Marc, Cristi, and Matti] gives a lot of strength and hope which I found really helpful and soothing.

I enjoyed the business plan reviews of Marc and Matti, in particular.

WHEN ASKED FOR RATINGS: 1 — Poor; 2 — Okay; 3 — Good; 4 — Great; 5 — Excellent

How was the availability and connection with fellow workshop participants?

1-5 rating plus comments: 4.4, 88%, B+

I will continue to reach out to others in the group after we complete [the final workshops] this week.

Good.

I didn't do a ton of connecting with fellows outside of the workshop.

That could be improved through maybe a WhatsApp group. But we as fellows also need to do our part which we didn't fully do. So, it is a 4 out of 5.

Very good, in the weekly sessions, not good in my private [plan guide interactions].

How was the experience, if applicable, of preparing and presenting your business or service (income) plan to the group?

1-5 rating plus comments: 4.8, 96%, A

I feel so much more confident that I can be successful with my business as a result of preparing the plan and receiving the feedback from the group. And participating in others' presentations was a great opportunity to be of service.

The preparation of the plan and presentation seemed to have gone pretty smoothly.

Very easy and welcoming.

I enjoyed the work I did on it.

How was the experience, if applicable, of receiving real-time direct encouragement and support?

1-5 rating plus comments: 5, 100%, A+

I'm especially grateful for Cristi's and Bob's individual support to me, and the way Bob led the group to encourage our supporting each other. Also, the focus on surrender and being open.

This was probably the most encouraging part of the conference for me, and it made me feel very positive about the process.

Very cute. [**NOTE:** This was translated from German: "sehr süß"]

Very good, in the weekly [workshops] and getting guidance from Bob.

How was the experience of giving real-time direct encouragement and support to fellow BDAers?

1-5 rating plus comments: 5, 100%, A+

Working with Claire is good. Reinforcing that it is all spiritual and about being of service.

Giving support not only gave me the opportunity to be of service but also helped me to see what I was learning and applying.

It was good.

I also like giving specific real time encouragement as I know how much it was helpful for me to hear.

Very cute too. [**NOTE:** See above.]

I can't rate myself on the encouragement I gave, but it was very gratifying, and hopefully positive for others. → I appreciated the sincerity and openness of the other participants, and their willingness to share the details of their business and goals.

How was the experience of reviewing and sharing on all 12 BDA Tools over the course of three months?

1-5 rating plus comments: 5, 100%, A+

Weekly reminder of importance of following tools as a part of recovery from debting.

I was new to the BDA tools, although I've certainly read them before. Sharing on each one over our time showed me their usefulness, and I learned lots about different ways to apply them.

I thought it was very helpful.

I actually really enjoyed this and I am very glad I joined the conference. I feel that this set me up with a strong foundation as I move forward in my recovery in this program.

Very helpful. Even more than most meetings. And the meetings are already great.

Very good.

WHEN ASKED FOR RATINGS: 1 — Poor; 2 — Okay; 3 — Good; 4 — Great; 5 — Excellent

Did you make progress on your business or service (income) plan during this conference cycle?

1-5 rating plus comments: 5, 100%, A+

Yes, my service plan is complete, and I feel confident to move forward with a business plan with support from my sponsor and a BDA PRG.

No.

Absolutely — made a ton of good progress on understanding the intricacies of my service plan and I think it will serve my business very well in 2024.

Big time. 5 of 5.

Yes, I would like to take it further.

Did you complete your business or service (income) plan during this conference cycle?

1-5 rating plus comments: 5, 100%, A+

Yes.

No.

Completed my service plan yes, very encouraged by this.

Yes. 5 of 5.

Yes, service plan.

Did this conference cycle help prepare you to be a business owner or a more confident business owner?

1-5 rating plus comments: 4.8, 96%, A

Supported that I need to maintain clarity and awareness.

Already mentioned above.

Yes.

I would say so, yes. Not only did I get clarity around my services, but I also have a better idea about the rough margins I have to operate within as I deliver this service to my clients.

Absolutely. It makes everything possible. It is a necessity. And of unbelievable value.

Yes, this conference helped lay the groundwork. It did boost my confidence to overcome some fears and mental obstacles.

Did this workshop cycle help prepare you to be able to help fellow BDA members create their own plans?

1-5 rating plus comments: 4.6, 92%, A-

Learned the value of following the workshop material and if the materials are followed makes the process much easier.

Yes, I feel willing to help with service plans.

No.

Yes definitely. I feel that I am capable of helping other BDA members through this now.

Not yet. I am not there yet. Still 4.

I do not feel prepared to do that type of service.

If you could wave a magic wand and make three changes to the conference cycle, what would they be?

Individuals have worked or are working the steps in DA or BDA or another 12-Step program. Understand the value of surrender and have contact with a higher power. They understand that the workshop is based on spiritual solutions.

[**NOTE:** While we agree that there is value in taking the 12 Steps wherever we may take them, in our experience the application of the 12 Steps through DA and BDA is unique and specific. Our group's message is solvency first, Steps second, everything else third or later. When we say Steps, we mean taking the Steps in DA and / or BDA, beginning with an admission that we are "powerless over debt." If we can't make that admission, we may be seeking a solution that DA and BDA do not offer. We mean debting with money; in our experience, most other forms of "debting" are rationalizations to override our third Tradition and are more closely aligned with character defects and liabilities than they are with compulsive debting. We place both sets of tools — DA and BDA — in the everything else category. Let's get our solvency and spiritual recovery going before trying to "fix our finances" and "figure things out."]

I'm honestly stumped.

1. I would prefer the sessions to be 1-1.5 hours rather than 2 hours.
2. I would prefer the weekday sessions to be later in the afternoon (or evening).

You might express to others on your committee that it is a not a helpful shortcut to place people who are not prepared into the guidance position, if you have a lack of volunteers.

[**NOTE:** No shortcut was taken, and we — the steering committee or any other group conscience — don't get to decide who gets to do service and who doesn't, at least not unless or until a problem is uncovered and clearly defined. Previous planning conference participants made themselves available to be plan guides; they were qualified; and we had no historical experience to suggest that there would be problems. → We are all here to learn and grow together. We believe we are meant to have the recovery experiences our Higher Powers provide for us. Sometimes we don't like the experiences we have. Then it's our responsibility to take our own inventories and to practice acceptance and gratitude. We can also choose who we want to be in service when it's our turn to serve.]

1. Keep it going.
2. Help Bob to find more peace regarding difficult participants which are not easy to deal with.
3. Bring more willing people by making announcements to BDA UK with the strong community. Which I would have done anyway if it kept going.

Can you name three things about the conference cycle that you would not want to see changed?

1. The materials — the outline
2. Discussion of the tools
3. Presentations of the business plans and goals

Time boundaries / Clarity of the format

1. The two-hour time block, split between plan presentations and sharing on the tools.
2. The focus on being of service through my business, that it's HP's [business] that I steward.
3. The plan presentations and the feedback process.

The presentations, the tools work.

1. The presentation of the actual plans and the service provided afterwards around the encouragement.
2. Going through all of the [BDA] tools over the course of the cycle.

Make people, participants more grateful and stop being so self-centered. And not taking this all for granted. It's from debtors to debtors and a service in the group from the group not a bought service.

I understand the conference will not be continuing.

Did we focus enough on spiritual recovery in DA and BDA for your needs and wants?

Yes — Re-enforced that my business is a spiritual entity and I'm the steward of Higher Power's business. Showed me that I can show up for another person as a business planning guide — even when I wanted / want to quit. 😊

YES.

Yes.

Absolutely! Well done!

Yes, it was the right blend of recovery and specific actionable business teachings.

Yeah, that we could improve maybe. But even that is 4 / 5. I don't even know how. So maybe 5 even.

Yes, very much so.

Thank you for your participation and responses!