

Personal Strategic Plan Framework 2023

- A personal strategic plan creates your roadmap for action, a basis for decision-making, and standards by which to live. Your personal strategic plan helps you maintain balance in each area of your life, so you are more effective as a leader, spouse, friend, and community member. Your plan will help you understand where to put your attention and energy.
- The following document provides a framework for creation or update of your strategic plan based on the approach I have found most helpful for myself and leverages existing resources and methods you will likely recognize.
- If you have a personal coach, they may already have a framework that integrates into their program, and this is not intended to replace that. If you have a spouse or life-partner, consider which items might include them or benefit from development concurrently or collaboratively. Items 2 and 5 have additional steps with their own sections after this outline.

Recommended Steps (in order):

1. Consider your legacy and purpose
 - a. Consider what you would like your legacy to be at the end of your life and what purpose drives you ultimately.
 - b. I went through an exercise with Brett Pyle in person <https://www.brettpyle.com/Programs> and found this extremely helpful. He has an online assessment <https://www.brettpyle.com/Assessment>
2. Define your personal vision through a “Painted Picture”
 - a. This speaks to projecting your perspective forward to your ideal future state. Take time to consider what this looks and feels like. Please see the Personal Vision section below for more details.
 - b. This seemed like a good overview <https://www.inc.com/debbie-madden/this-1-simple-exercise-will-help-you-envision-future-you-want.html> however there are many examples out there
3. Discover your personal “Why” and what motivates you
 - a. I found this helpful when considering what underlining motivation drives me in everyday activities. It can help refine what is realistic in how you approach accomplishing items and what might inform what you gravitate to.
 - b. You can discover your “why” at <https://whyinstitute.com/> and I found it helpful to get an overview from Dr. Gary Sanchez beforehand, there are many podcasts and interviews out there if you have not been to an event where he spoke.
4. Capture your Core Values & Purpose
 - a. This exercise builds on step 1 and helps you to articulate some clear statements that can be leveraged for decisions and planning on a daily basis. The objective is to land on some defining values that inform your actions and attitudes. Working with this you then create a statement that captures the essence of your purpose.
 - b. There are many workshops and courses available around this. I found this one helpful <https://robertglazer.com/core-values-course/>
5. Build or revisit your Personal Strategic Plan
 - a. This is the step in which the groundwork you have accomplished will pull together into some specific strategic items with tactical initiatives you can implement.

- b. There is a section below, Personal Strategic Plan that goes into more detail. This is just one example; you might find an approach that works better. Regardless, the goal is to have something defined you can act on.
- 6. Identify the items that may derail your plan
 - a. After creating your Personal Strategic Plan consider what might distract or block you from accomplishing this. Be realistic and honest about fundamental items present in your life and routine you may need to adjust.
 - b. I found this assesment helpful in understanding what roadblocks I might be putting up for myself <https://www.positiveintelligence.com/saboteurs/>
- 7. Share your plan with those close to you
 - a. It is very likely that some aspects of your plan will impact, rely on and be integral to those around you. If you have developed this plan or participated with someone else in any of the steps, these are likely people you can share your plan with.
 - b. The items you have put out in front of you with your plan will almost certainly benefit from the help of others and may also help you with accountability. You just spent a lot of time to create the first step in living intentionally, my experience is that people will be respectful of this and support you in this.
- 8. Be open to review and adjustment; keep it current & relevant
 - a. Whatever format you capture your plan in, ideally this is accessible and can be updated easily. Consider what platforms or tools you use every day already or platforms that support shared work if you have a life-partner you are working with on shared items.
 - b. As we cannot predict the future and everything that may impact our life, the plan may need to be adjusted in the future and is worth revisiting during major life milestones or events. Keeping this current and applicable to your present life will invariably increase the value of plan and the relevance to you.

Personal Vision

- The objective is to leave the individual with an idea of what they want their life to be like in the future. It is not necessary to have a concrete statement, brand, or specific goals coming out of this exercise; sometimes there are intangible elements or a picture in one’s mind that will serve well.
 - In all categories it is acceptable to skip an item, list nothing or consider it not applicable.
 - Specifics will be developed later in your Personal Strategic Plan.
1. Analysis of Value, Opportunities, and Targets – What do you value about each of these items, what can they bring you, what more do you want in each of these areas? This is intended to get you thinking about the items you will need for the next step.

Category	Value	Opportunities	Targets	Notes
Partner/Spouse				
Children				
Extended Family				
Business				

Leadership				
Health				
Community				
Faith				
Financial				
Friends				
Recreation				
Legacy				

2. Time Travel

- a. Sometime in the future (it is suggested to think of twenty years from now) what is your age? Write it down, think of someone in your life that is this age to place this in perspective.
- b. How old are your parents, your children, your close friends?
- c. Reevaluate the status of above items in the table? Did any of these items change; if so are they more or less important?

3. Personal Vision

- a. Paint a picture of the perfect day, optionally incorporate elements from above or at a minimum wait until you have completed the above items to picture this.
 - i. Where are you?
 - ii. Who is with you?
 - iii. What is in the backdrop?
 - iv. What are you doing or not doing?
 - v. How do you feel?
 - vi. What is your daily routine or do you have one?
 - vii. What is different about your community and the world around you because of you?
- b. In the future, years from now, someone asks you to describe yourself, what do you tell them?
- c. The deliverable you will create out of this process will be the description of that perfect day, a “painted picture” of what your life looks like or a story of what is taking place that captures an ideal scenario for your future self.

Personal Strategic Plan

- For each area below, list in the tables provided your top priorities, why they’re important to you and others, the first step you will take toward achieving the result you want, and when you want to accomplish each one.
- Your personal strategic plan will be organized into categories listed below, but feel free to relabel a category if you would like to organize this differently.
 1. Me – your personal goals for yourself, including physical, mental, and spiritual
 2. Family/Friends – goals for your relationships, including your spouse, children, friends, and family

3. Leadership – your goals to develop yourself as a leader, to identify and develop your successors, to watch for trends affecting your business, and to lead the company’s vision
 4. Business – your critical goals to accomplish with others in your company
 5. Community – your goals for being involved in your community, including volunteer work, coaching, charitable giving, teaching, etc.
- The last table of Current Priorities is where you consider what your top three initial items are that you will start on right now from the above items and list them here.
 - Utilize a platform that will allow you to track progress, develop tactical sub-items, collaborate with others, and be front of mind with reminders, calendar appointments or whatever works for you.

Me

What [result I want]	Why [benefits]	How [first step]	When [time]

Family/Friends

What [result I want]	Why [benefits]	How [first step]	When [time]

Leadership

What [result I want]	Why [benefits]	How [first step]	When [time]

Business

What [result I want]	Why [benefits]	How [first step]	When [time]

Community

What [result I want]	Why [benefits]	How [first step]	When [time]

Current Priorities – what you will start on right now?

What [result I want]	Why [benefits]	How [first step]	When [time]

I hope you found this helpful and I welcome any suggestions on additional resources to include in this document.