

3be Creating Your Personal Strategic Plan

"The real path to greatness, it turns out, requires simplicity and diligence. It requires clarity, not instant illumination. It demands each of us to focus on what is vital—and to eliminate all of the extraneous distractions." Jim Collins

The period of 2020-2022 will go down in the history books as the era of predictable unpredictability. The turmoil of this pandemic has led many of us to reassess our personal, career, and financial priorities. As we make decisions about our future, it is essential to have a north star to guide us - to help set priorities, and to stay focused and adaptable, especially as more uncertainty reigns in 2022.

In a corporate setting, many of us are guided by the vision, mission, goals and strategic priorities of a strategic plan –it provides us with a launch pad during times of growth and guard rails during times of uncertainty. Executing a widely-shared strategic plan is critical to the success of an organization.

Do you have a personal strategic plan to guide you in this era of predictable unpredictability? We've taken our organizational strategic planning methodology and revised it for personal use. Find 90 minutes, give it a try and see if it helps you gain clarity during these uncertain times.

A personal strategic plan is just as important as an organizational strategic plan. Creating one doesn't have to be a daunting process. The benefits are that it allows you to gain clarity, set a focus, and steer away from distractions that hinder you from reaching your personal goals.

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Creating Your Personal Strategic Plan

6 steps to create an effective personal strategic plan that helps you achieve success ... as **you** define it.

	30 min	60 min		As needed	15 min per month	
	SCAN	ARTICULATE	DEFINE	ALIGN	EXECUTE	MONITOR
About	<p>SCAN your current situation. Set aside 30 minutes to reflect on where you are in your life today. Jot down your answers to the following questions:</p>	<p>ARTICULATE your personal vision, mission, and values. Write down words that describe the following:</p>	<p>DEFINE your priorities – a handful of "I must" statements that will help you achieve your vision through executing your mission. Follow these steps:</p>	<p>ALIGN actions to your "I must" statements. Set out key initiatives, actions, accountabilities and timelines for each "I must" statement:</p>	<p>EXECUTE your personal strategic plan! This is when the fun and progress begin!</p>	<p>MONITOR your progress. Check in on your personal strategic plan regularly, and course-correct as required.</p>
Tips	<ul style="list-style-type: none"> ▶ How satisfied are you with the way things are going in your work and life right now? Score this out of 10. ▶ List your biggest achievements in this past year? Your biggest disappointments? ▶ What strengths helped you create success and combat the disappointments? ▶ What weaknesses hindered you? ▶ What opportunities do you see for yourself in the future? ▶ What do you want more of and less of in your life? ▶ Thinking of COVID, how have your 'non-negotiables' changed? 	<ul style="list-style-type: none"> ▶ Vision: A description of your preferred future, written as if you are already there. Make it attractive, credible, and realistic, but also a stretch from where you are today. Your vision will serve as a clear guide for evaluating current and future courses of action. ▶ Mission: State your ideal purpose – what you'd like to do day in and day out and the results you will create in pursuit of your vision. Make it aspirational. ▶ Values: A handful of core beliefs that guide your behaviour. These are non-negotiables and serve as guideposts for you. 	<ol style="list-style-type: none"> 1. Review your current situation and your vision, mission and values. What do you notice? 2. Create a list of issues and opportunities that summarizes what is standing in the way of achieving your vision and mission, and opportunities that will help you accelerate towards them. 3. Consolidate your list from step 2 into 3-5 issues/opportunity statements. 4. Review each of these statements and identify one "I must" statement that resolves the issues/opportunity. 	<p>For example, let's say you have an "I must" statement that reads: "I must spend more time with my extended family members." <i>(Note: this is aligned with your mission and vision and resolves an issue identified earlier.)</i></p> <p>Develop key activities, actions, accountabilities, and timelines for this, such as: Key Activity: Meet up with all extended family members at least one time per month – in person or virtually. Action: Set up calendar meet ups in 3-month chunks. Who: Me When: Schedule in place for Feb – Apr by mid Jan '22 Result: Deeper connections with family members.</p>	<p>As Peter Drucker once said, <i>"Plans are only good intentions until they immediately degenerate into hard work"</i>. Document your strategic plan on one page and include your detailed action plan on page 2. Then.... get to work....or to fun, as the case may be....</p>	<p>Think about:</p> <ul style="list-style-type: none"> ▶ How did you do in executing your plan? ▶ Which actions are on track, which ones need attention, and which are off track? ▶ Recalibrate your plan as necessary. ▶ Remember, it is not set in stone, it is a guideline in which real life happens! ▶ Celebrate your successes! ▶ Revisit this plan annually or when other major changes occur or are on the horizon.