

Your Personal Strategic Life Plan

Life will not go according to plan, if you do not have a plan.



Sample Plan



The purpose of Personal Strategic Planning is to provide you with a resource that when implemented, reviewed, and revised will allow you to become a better person, do more than you ever imagined, and have more health, wealth, and happiness.

This Sample Personal Strategic Plan is designed to help you understand, through specific examples, the value of personal leadership. Personal leadership is not a singular experience; rather, it is an ongoing process of clarifying your vision and values and aligning your life with the timeless principles of focus, alignment, and balance.

Personal strategic planning can be extremely exciting and at the same time a bit scary. You will look at key areas of your life and start to think about what you would like to accomplish. You will be asked to step outside of your comfort zone and begin to grow and thrive in new ways.

Personal strategic planning is all about a thought process that produces fundamental decisions and then move into actions that shape who you are, where you are going, what you do, and how, when, and why you do it.

All of this is done with focus on the future.

Some of the best opportunities in life are the ones we create. Your investment in and implementation of Your Personal Strategic Life Plan will help you to create an ideal life and achieve more in the next year than you have in the past ten years.

You must be applauded for your commitment to yourself. This work is key to your successful future - we aren't just talking about financial rewards here, we are talking about the opportunity of making your life all that you have ever dreamed that it could be.

“If you don't create your own future - someone or something else will create it for you.”

Anonymous



Developing Your Plan

Your Personal Strategic Plan is comprised of twelve sections:

- I. Vision Statement
- II. Legacy Statement
- III. Mission Statement
- IV. Personal Philosophy
- V. Core Values
- VI. Code of Ethics
- VII. Goals
- VIII. Plans, Strategies, and Timelines
- IX. Themes
- X. Personal Board of Directors
- XI. Personal Maintenance & Performance Check-Up

Where Do You Begin?

I recommend that you begin the process of creating your own personal strategic plan by reviewing the following *Sample Strategic Plan*.

The Sample Strategic Plan has been included to guide you much like blueprints guide a builder in the construction of a home. By becoming familiar with its layout, you will have a clear understanding of expectations and firsthand knowledge of just what your finished plan should look like.

I. Personal Vision Statement

A vision is a guiding image of success molded in terms of a contribution to society.

EXAMPLE:

"I will inspire, promote, and celebrate excellence in everyone I come in contact with!"

The following serves as a narration of this legacy statement.

"I will..."

The word "I" is a personal declaration of what I am and will continue to accomplish each day of my life. My vision is not something I intend to demonstrate, it is something I will always manifest through action.

I release that that for my vision to be powerful and compelling to both myself and others, that it must be personalized. Therefore, whenever I speak about my vision to myself or others, it will always be presented in the personal, and present tense.

"...inspire..."

To inspire is to influence, move, or guide. Through my actions I will motivate people to raise their standards and live by a higher moral code. The net effect is that the inspired party will do the same in the lives of others.

"...promote..."

To promote is to contribute to the growth or prosperity of another human being. My objective in every interaction is to further promote and challenge the principle of excellence. The net effect is that each person will contribute to the growth and prosperity of others through my example.

“...celebrate...”

To celebrate is to publicly and privately acknowledge and honor a specific action or behavior. I will look for what's right with the world and celebrate and acknowledge excellence and all virtuous activity.

The net effect is that the celebrated party will continue to add value while inspiring excellence in others.

My vision calls for the creation of an ever expanding network of high quality people. We will all work and live to inspire, promote and celebrate the behaviors that we want repeated in society to include excellence, character, peace, love, and integrity...

“...excellence...”

I believe that as a member of the human race, it is our individual and collective duty to commit our lives to excellence. It's my belief that excellence is the process of continually growing and improving yourself and your life through quality thinking, positive habits, and exceptional execution.

Excellence is achieved via qualitative, not quantitative shifts in developing skills. Being part of a qualitatively different world or environment where excellence is expected and practiced is a key to achieving excellence and that's precisely why I am committed to inspiring, promoting and celebrating this most important virtue!

II. Personal Legacy Statement

A legacy statement allows you to think about your impact on future generations and your overall life's contribution.

EXAMPLE:

"When I reach the end of my days, I must look back on something more meaningful than the pursuit of houses and land and machines and stocks and bonds. Nor is fame of any lasting benefit.

I will consider my existence to have been wasted unless I can recall:

- *a loving family,*
- *a consistent investment in the lives of people,*
- *an earnest attempt to serve the God who made me."*

The following serves as a narration of this legacy statement.

“When I reach the end of my days, I must look back...”

God willing, I will live a long, healthy life and will be proud of my time spent here. Like everyone, I will leave behind a legacy.

To be proud of my legacy, I must make deliberate decisions today and everyday as to my choice of actions and words so that when looking back, I can genuinely say I did my best with what I had.

“...on something significantly more meaningful than the pursuit of houses, land, possessions, and stocks.”

There is no permanence in possessions and their place in my life has been and will continue to be minimized. The legacy I wish to leave cannot be touched by the hand, only by the heart.

What I want people to remember is how I made them feel. That for me is the very embodiment of significance.

“...nor is fame of any lasting benefit...”

While my career choices provide me with numerous public forums, the motivation behind these choices is not fame, but to teach and share with others what I believe deeply to be true.

“...I will consider my earthly existence to have been wasted...”

Wasted is a strong but deliberate choice of wording. It impresses upon me the significance of my everyday actions, words, and intentions.

“...unless I can recall a loving family...”

It is my fondest wish to be remembered by friends and associates as a loving husband and father. I look forward to this time of my life and will maintain integrity to all my commitments and responsibilities.

“...unless I can recall a consistent investment in the lives of other people...”

I believe that we all contribute to one another everyday of our lives. It is my desire to make positive deposits into the lives of everyone I meet both personally and professionally, so that their lives are better.

Even if I can do nothing to help someone, I will do that nothing well!

“...unless I can recall an earnest attempt to serve God.”

My mission and legacy must be of someone who had God’s best interest in mind. I pray daily for wisdom, strength, and character. I trust that by teaching people how to set goals and direction for their lives that I am doing good work. That by helping people to find and live their mission, in some small but important way I am assisting God in his mission.

III. Personal Mission Statement

A personal mission statement provides the reason for being and answers the question: “Why do I exist?”

EXAMPLE:

“My mission is to be a loving teacher, student, and example of simple, universal, and timeless principles of human effectiveness, which help me and others to awaken, reinforce, and expand the presence of God in our lives.”

The following is a narration of this mission statement.

“...to be a loving teacher, student, and example...”

My business and personal life are very much interdependent of one another. My words, actions and beliefs are directed toward teaching and helping others to live a wholesome, loving, balanced and fulfilled life.

I fundamentally realize that one’s actions and behaviors speak louder than the actual words used. Therefore, my life will be an example of my words so that my walk models my talk.

By living this way and by concentrating on being an example there is a double benefit. First it challenges me personally to stay the course I have chosen, and second it will be a source of encouragement and motivation for others.

“...of simple, universal, and timeless principles of human effectiveness...”

It is my belief that as a society we have lost sight of the simplicity of life. Many of us have been caught in the web of complexity and experience more stress than is necessary.

It is my mission to embrace and exemplify simple, universal, and timeless principles that are just that:

Simple to digest and live by, such as love, respect, integrity, honesty, and being of good character.

Universal in that everyone, anywhere, regardless of any criteria, can and will benefit.

Timeless in that they have been proven and validated by the test of time. Principles that will never go out of fashion or that require alteration.

I firmly believe that a commitment to a set of principles can and will allow myself and others to be highly effective in any situation.

“... that helps myself and others...”

As stated earlier, there is a double benefit to this equation, one that impacts my own life by keeping me in check, which ultimately impacts others in a positive way.

“...to awaken, reinforce and expand the presence of God in our lives...”

I am a small but important player in God’s divine plan. It is my primary objective to bring as many people to God as I can during my lifetime. I will fulfill this by helping people to realize that faith in God is the only real security we will ever have on this imperfect earth.

IV. Personal Philosophy

A personal philosophy offers an explanation of freedom and determinism, individual and societal rights, good and evil, and truth and falsehood.

EXAMPLE:

“Everything Counts!”

Everything Counts offers a philosophy for running a great business and for enjoying a great quality of life. Its meaning is simple, powerful, and summarizes my commitment to living a life of quality and supports my commitment to excellence:

Everything I say, every thought I entertain, and everything I do has a direction, which serves as an advance or a retreat in respect to my pursuit of excellence. Everything, regardless of size or intent has bottom-line consequences; therefore, everything counts—this is the golden rule of excellence.

V. Core Values

Fundamental to any strategic planning process should be the identification of one's personal values and ethics. Our values act as our compass, guiding us through life's terrain.

EXAMPLE:

Integrity - The unswerving commitment to always do what is right.

Maintaining honor above all and letting my word be my binding contract.

Measuring Integrity

- Whenever I feel honest with myself
- Whenever I feel honest with others
- When I honor my commitments

VI. Personal Code of Ethics

A Personal Code of Ethics serves to remind us of the values and ideals we admire and by which we enforce accountability.

EXAMPLE:

The Boy Scout Laws - 1908

A Scout is TRUSTWORTHY. A Scout tells the truth. He keeps his promises. Honesty is part of his code of conduct. People can always depend on him. A Scout is LOYAL. A Scout is true to his family, friends, Scout leaders, school nation, and world community.

A Scout is HELPFUL. A Scout is concerned about other people. He willingly volunteers to help others without expecting payment or reward.

A Scout is FRIENDLY. A Scout is a friend to all. He is a brother to other Scouts. He seeks to understand others. He respects those with ideas and customs that are different from his own.

A Scout is COURTEOUS. A Scout is polite to everyone regardless of age or position. He knows that good manners make it easier for people to get along together.

A Scout is KIND. A Scout understands there is strength in being gentle. He treats others as he wants to be treated. He does not harm or kill anything without reason.

A Scout is OBEDIENT. A Scout follows the rules of his family, school and troop. He obeys the laws of his community and country. If he thinks these rules and laws are unfair, he tries to have them changed in an orderly manner rather than disobey them.

A Scout is CHEERFUL. A Scout looks for the bright side of life. He cheerfully does tasks that come his way. He tries to make others happy.

A Scout is THRIFTY. A Scout works to pay his way and to help others. He saves for the future. He protects and conserves natural resources.

He carefully uses time and property.

A Scout is BRAVE. A Scout can face danger even if he is afraid. He has the courage to stand for what he thinks is right even if others laugh at him or threaten him.

A Scout is CLEAN. A Scout keeps his body and mind fit and clean. He goes around with those who believe in living by these same ideas. He helps keep his home and community clean.

A Scout is REVERENT. A Scout is reverent toward God. He is faithful in his religious duties. He respects the beliefs of others.

VII. Goals

A goal is more than a thought in your head. It's a profound message about who you are and what you are capable of.

EXAMPLE:

- To be financially independent is NOT a goal. To retire at 48 with a \$5 million dollar net worth is.
- To lose weight is NOT a goal. To lose 10 pounds and 4 inches on your waist by June 15 is.
- To increase sales is NOT a goal. To increase sales by 17% and profit margins by 5% by the end of the December is.

VIII. Plans, Strategies, and Timelines

Fundamental to any strategic planning process is the identification of your goals, the creation of systematic action plans along with their corresponding timelines for achievement.

EXAMPLE:

Use the Goal Setting Forms that accompany the Master Planning System.

IX. Themes

A strategic behavioral theme is a subject or topic of distinctive quality, characteristic, or concern that you want to improve upon.

EXAMPLE:

“I would be much more productive and successful if I could just be more disciplined.”

The following serves as an example of how you can employ greater discipline as a behavioral theme throughout your life:

- Time - How can I be more disciplined with my time?
- Money - How can I be more disciplined with my money?
- Eating Habits - How can I be more disciplined with my eating habits?
- Exercise - How can I be more disciplined with my exercise routines?
- Internet - How can I be more disciplined with my use of the Internet?
- Communication - How can I be more disciplined with my communications with others?
- Spiritual - How can I be more disciplined in my spiritual life?

X. Personal Board of Directors

A personal board provides both wisdom and support for the attainment of a specific purpose.

EXAMPLE:

The following people will support my progress and perform these roles:

Connector: Larry Benet

Clarifier: Cathy Johnson

Challenger: Devin Marks

Wise Elder: Corbett Merchant

XI. Maintenance Plan & Performance Check-Up

An effective personal strategic plan has built in performance metrics and measurements that allow you to evaluate your performance and determine corrective or ongoing action.

EXAMPLE:

During each performance review, I will follow these five steps:

Step #1 - Identify the goal or action item to be assessed.

Step #2 - Analyze current results in relation to intended outcomes.

Step #3 - Inspect all successes and failures for causes and effects.

Step #4 - Update strategy and action items if necessary.

Step #5 - Follow up on any necessary actions - immediately

Step #6 - Celebrate and enjoy each goal achievement.

XII. Personal Reasons Why!

Motive or motivation is a need or desire that causes a person to act. Your why is a motivating force, stimulus, or influence, it's an incentive that generates energy and drive.

EXAMPLE:

The success of this business as well as all associated activities will require a complete, 100% commitment from me to include a number of short-term but pivotal sacrifices.

Being fully aware of the amount of time and energy that this business will initially demand of me, I am prepared, willing, and determined to do whatever is necessary to ensure its success.

As the sequence of the following reasons suggests, I am doing this for myself as much as for anyone else. Over the course of the next few years I expect to experience some significant performance and mental breakthroughs. I also expect some wonderful but very painful learning experiences as well.

Much of the next few years will be lived outside of my comfort zone. I suspect that will be true of all the people associated with this projects success as well.

The following is written to help me when I start to wonder about the motivation for working toward this goal.

There are five compelling motivators at work:

- Quality of Life
- Financial Gain
- Helping Others
- Credibility
- Prospects

1. Quality of Life / Living

I would like to do more during my life than simply work from 9-5. Having and living a quality life is of significant importance to me.

A quality life to me means being able to spend time raising my children, attending their class functions, coaching little league, nurturing my relationship with my wife, etc.

It also means that I can come and go as I wish, live where I choose, and associate with people that are nourishing. A quality life will also afford me the luxury of exploring many interests that I've put on hold (such as art, history, music, and community involvement).

To enjoy this quality of living, this project must be able to generate...

2. Financial Gain and Ongoing (Passive) Revenue Streams

I fully expect this project to succeed. While I'm not completely sure how I'll eventually measure success; one measure will certainly be financial gain.

My interest lies in creating long-term profits. What drives me is the ability to design a business and its associated products that will continue to sell on their own merits—around the clock and around the world. This will be accomplished through strategic alliances, licensing arrangements and other savvy marketing methods.

Financial gain will only be realized through excellent planning, a complete commitment, and the creation of the world class products and services that will allow me to have a...

3. Positive Impact on the Life of Others

I believe that the work I do is excellent, that it benefits individuals, families, and organizations.

My goal is to help other people achieve their goals and desires by providing world class materials that allow them to lead a purposeful and goal directed life.

The development of these products and services and their acceptance will greatly enhance my personal and professional...

4. Credibility

I will work to the best of my abilities to earn the respect of my clients, peers, coworkers, family, and all others. I believe that a credible, high quality person attracts others of credibility, and quality.

I hope that my personal integrity and the credibility I have established will attract high quality...

5. Prospects

I want to be associated with people of character and vision that believe in what I offer and who have a genuine interest in making changes in their lives.

I believe that my hard work over the next few years will result in a shortened sales cycle, finely tuned products and services, and increased fees for the services we provide.

I expect the commitment that this project demands will bring out the best in me. I will have to dig deeper than I ever have in my life, this effort will challenge me to create and deliver the best products and services I am capable of.

I vow in advance to do all I can to manage the stressful situations that will be presented due to project quality, deadlines, and the pace of our progress.

I trust, hope, and pray that over the next few years the people in my life will be understanding and supportive of my efforts, needs and success. I sincerely wish that we all grow and benefit and become better people as a result.

*"I once thought that if I could ask God one question,
I would ask how the universe began, because once I knew that, all
the rest is simply equations. But as I got older I became less concerned
with how the universe began. Rather, I would want to know why
he started the universe. For once I knew that answer, then I would
know the purpose of my own life."*

** Albert Einstein **