

Personal Strategic Plans

Getting more of what you want



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**“If you don’t know where you are going,
that’s probably where you’ll wind up,
no where.”**



Introduction

1. Name
2. Company you work with/for
3. Why you decided to come here today
4. What do you hope to get out of our time together
5. What is the one word that best describes you



Objectives of This Seminar:

1. To gain an understanding of the strategic planning process.
2. Application of that process to personal choices and decisions.
3. To learn how to identify your personal vision, core values and goals.
4. Personal development.
5. Immediate skill-sets to implement.
6. Motivate you to action.



Strategic Planning



The Myth

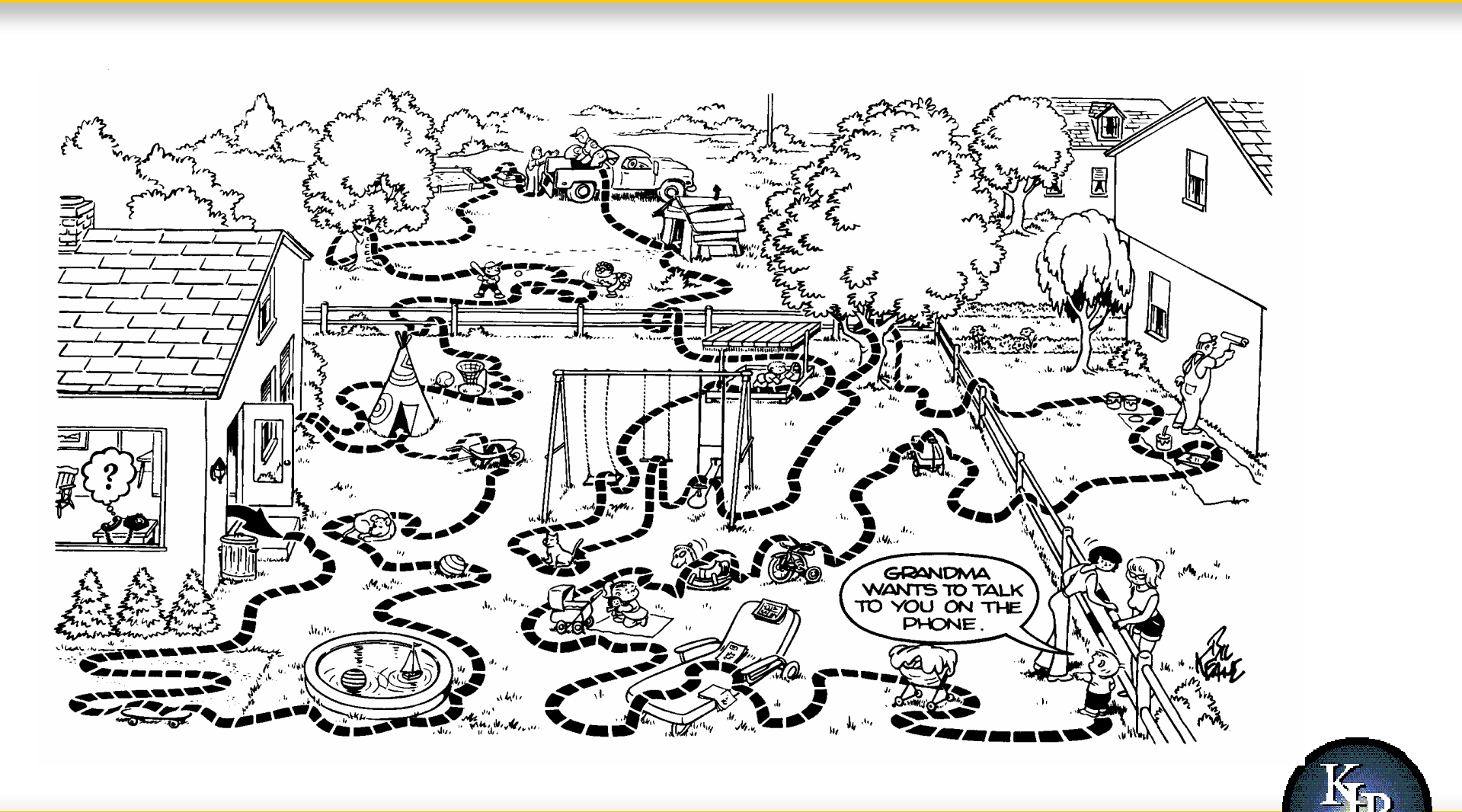
A long and expensive process only major corporations need.

The Reality

A simple six-step process any individual can use personally and professionally.



The Process Without a Strategic Plan



Alice In Wonderland

One day Alice came to a fork in the road and saw a Cheshire cat in a tree.

“Which road do I take?” She asked.

His response was a question:

“Where do you want to go?”

“I don’t know,” Alice answered.

“Then” said the cat, “it doesn’t matter.”



Six Simple Steps of Strategic Planning

1. Identify core values and purpose.
2. Craft vision and mission statements.
3. S.W.O.T. Evaluate internal and external influences.
4. Design goals to achieve improvement and desired results.
5. Engage and deputize all involved.
6. Celebrate and revise.



Why We Need Strategy

- Clearly defines direction and purpose.
- Establishes realistic goals and objectives.
- Gains buy-in and ownership.
- Blueprints the use of resources.
- Creates measurement and evaluation.
- Focuses efforts and results.
- Communicates to all affected.



Step One:

Identify your personal core values

- What am I trying to achieve?
- Why do I want to do this?
- What drives you?
- What do you stand for?

Your few extremely powerful guiding principles that have a profound impact on how you think and act; your “soul”



Step One

Sample core values:

Some Core Values to Consider

Altruism

Fun

Excellence

Community

Competition

Growth

Profitability

Time

Trust

Loyalty

Clarity

Risk-taking

Freedom

Ownership

Cooperation

Caring

Integrity

Leadership

Humor

Commitment

Balance

Connection

Partnership

Honesty

Autonomy

Openness

Creativity

Independence

Social Responsibility

Respect

Recognition

Service

Accomplishment

Self-Expression



Step Two

Identify who you are

Vision

- A statement of your dream, where you visualize yourself at your best

Mission

- Why you are here; your purpose

The most important thing in business (and life) is to decide what is most important



Vision



Mission



Step Three

Evaluate internal and external Influences

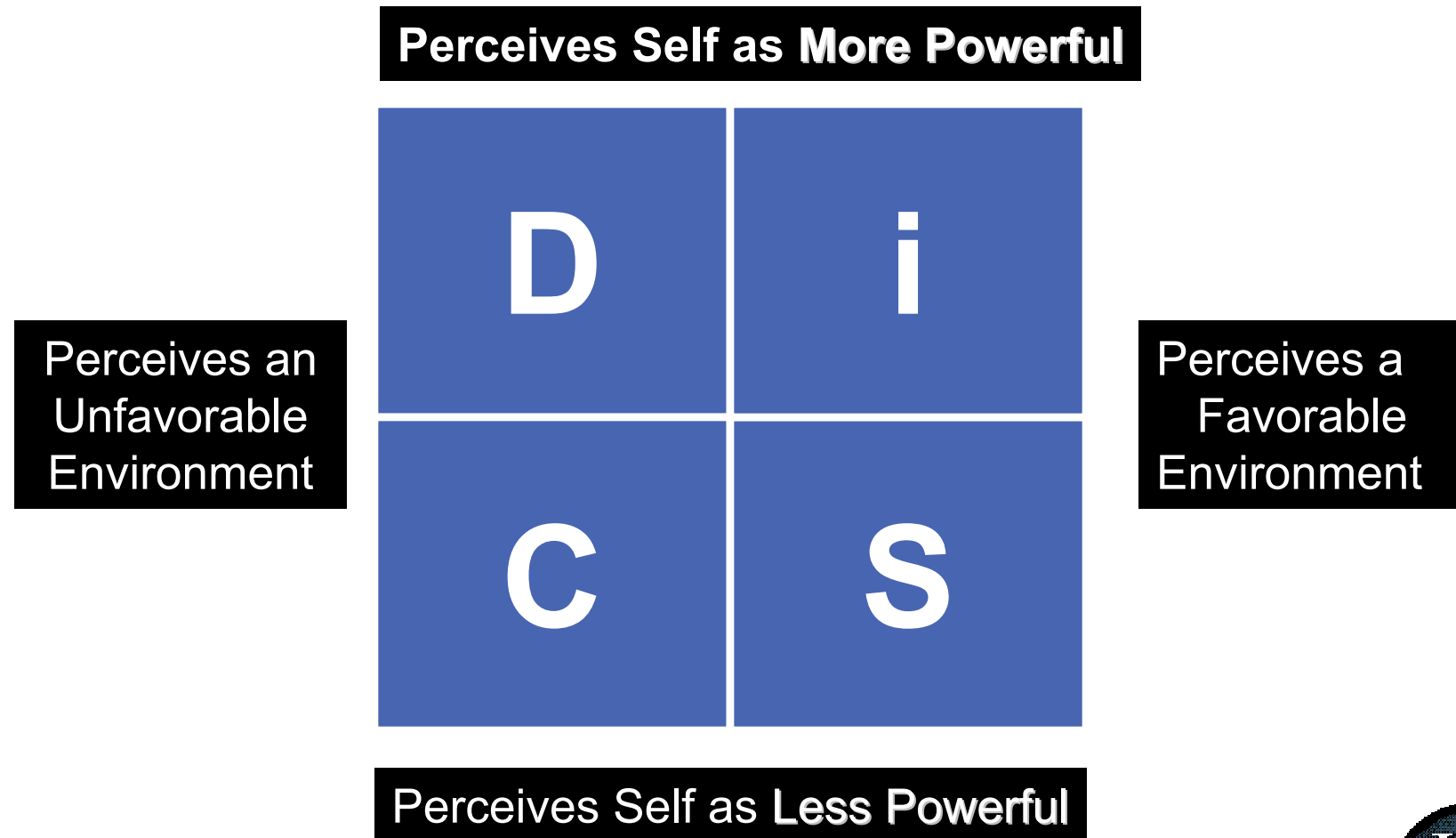


Successful People

1. Understand themselves and how their behavior affects others
2. Understand their reactions to other people
3. Know how to maximize on what they do well
4. Have a positive attitude about themselves
5. Know how to adapt their behavior



Marston's DiSC Model



High D in Their Environment

Sees an unfavorable environment that they want to overcome

Tries to change, fix, or control things

Natural Emotion:

Anger

Communication Style:

Direct and to the point

No fluff

No “warm and fuzzy”

Biggest Fear:

Being taken advantage of

Theme Song:

“I Did It My Way” - Sinatra



High I in Their Environment

Sees a favorable environment in which they can influence others

Tries to persuade, promote, or influence others

Natural Emotion:

Optimism

Communication Style:

Inclusive

Personal

Upbeat

Biggest Fear:

Not being liked

Theme Song:

“Celebration” – Kool and the Gang



High S in Their Environment

Sees a favorable environment that they want to maintain

Tries to be cooperative, supportive, and agreeable while keeping things stable

Natural Emotion:

Fear

Communication Style:

Methodical

Bullet Points

Fact Based

Biggest Fear:

Being wrong

Theme Song:

“Eight Days A Week” - Beatles



High C in Their Environment

Sees an unfavorable environment that they do not want to try to change

Tries to work within established rules, guidelines, and procedures to ensure accuracy and quality

Natural Emotion:

Non-emotional (hide their emotions)

Communication Style:

Friendly

Relaxed

Non-confrontational

Biggest Fear:

Change

Theme Song:

“Stand By Me” – B.B. King



What Type Do You Think You Are?



The real tragedy of life is not that each of us doesn't have enough strengths, it's that we fail to use the ones we have.

Let's put your strengths to work!!!



Step Three

Evaluate internal and external Influences **S.W.O.T.**

Internal Influences

You know these, but don't necessarily share them

Strengths

- What we do best
- Have all the tools, talents and skills
- Where are we recognized

Weaknesses/Challenges

- What we struggle with
- Inconsistencies
- Don't have the resources

Capitalize on strengths to minimize or eliminate weaknesses



Step Three

Evaluate internal and external Influences **S.W.O.T.**

External Influences

Outside forces that can help or challenge you

Opportunities

- Associations and Collaborations
- Leverage Exposure
- Who does what I do?
- Who is doing things differently?
- Out-Of-The-Box Thinking

Threats

- Competition
- Economic Factors
- Lack Of Market
- High Costs
- No Growth



Step Three

S.W.O.T. Worksheet

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS



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4. **Design goals to achieve improvement and desired results.**
5. Engage and deputize all involved.
6. Celebrate and revise.



Step Four Goals

- Ask the questions where do you want to be?
- Develop a list of goals to get there
- Always use **S.M.A.R.T.E.R.** goals

S – *Specific*

M – *Measurable*

A – *Achievable*

R – *Relevant*

T – *Timely*

E – *Extending*

R – *Rewarding*



Action Plan

S.M.A.R.T.E.R. Goals

<i>What</i>	<i>By Whom</i>	<i>When</i>



Step Five

Engage and deputize all involved

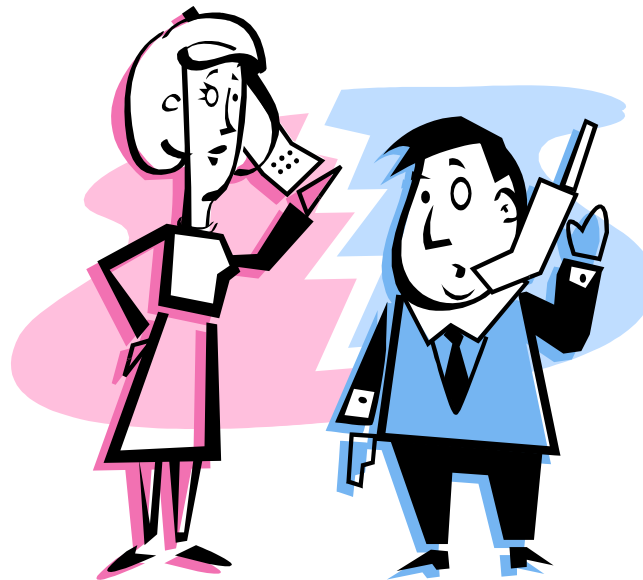
- Employer
- Employees
- Coach
- Friends and Family
- Movers and Shakers

Success does not depend upon the brilliance of your plan
but upon the consistency of your actions.



Support Network

How many times in your life have you said you were going to do something and then not done it because no one would know the difference?



Step Six

Celebrate and Revise

- Recognize
- Reward
- Acknowledge
- Invest in thank you
- Look at the next level as a celebration



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Sample Personal Strategies

- Have a job that matches my passions with my work.
- Commit to supporting my team with this process.
- Gain the knowledge and training to earn a promotion in the next year.
- Achieve financial stability and success.
- Improve my life/work/fun balance.
- Dedicate 25% of my time to be with my family.
- Identify a cause where I can donate my time.
- Integrate a healthy lifestyle.



Just Imagine What You Will Achieve When:

- You have a clearly defined direction and purpose.
- You have established realistic goals and objectives.
- You maximize your strengths and mitigate your weaknesses.
- You have communicated to all affected.
- Everyone buys-in and supports you.
- You can measure and evaluate your progress.
- Your efforts and results are focused.
- You have reason to acknowledge success and celebrate



A Gift For You

E-Mail me at Kristi@klrconsulting.com, and I will send you a questionnaire that will help you reflect back on 2006, set you up for success for 2007 and help you hit the ground running.



Let's Remember

**“Knowing is not enough;
we must apply.**

**Willing is not enough;
we must do.”**



Thank You!!



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