



Personal Strategic Plan Worksheet

The best and most relevant personal strategic plan is tailored to focus on what matters most to you. Typically, a plan encompasses career issues (such as ongoing development in your current role, raised visibility in your field, or a job change), finances, health, and key relationships. However, it is fine to include additional topics that are important to you, such as new adventures, travel, or spiritual development.

Here are some steps for creating your own personal strategic plan, whether you do it at the beginning of a new year or at any other time.

Step 1: Find time. You need to break away from your day-to-day duties and responsibilities and dream about what you want to accomplish.

Step 2: Clarify your values. What do you value most in your life? It is usually easy to identify the first few (e.g., family, health, happiness), but you need to dig deeper for the purposes of a personal strategic plan. Think carefully about what else you truly value and want to honor. Consider leadership roles at your organization or your community, close relationships and connectivity at both personal and professional levels, recognition or greater influence, time, freedom and flexibility, life/work balance or integration, personal growth, new challenges, wealth, service, and meaningful work.

Step 3: Create your mission statement. This is a brief written statement, just a sentence or two, based on the values you want to honor. It is not intended to redefine who you are. Rather, it serves as a reminder of your life's purpose. Your statement is a valuable touchstone that you can use to help guide your behavior and inform your decisions.

Step 4: Do a SWOT analysis on yourself. This is the process of analyzing yourself thoroughly before you begin setting specific goals and planning certain activities. You begin your performance audit by asking yourself some key questions:

- What are my personal strengths, weaknesses, opportunities, and threats?
- What are my marketable skills?
- What can I do that someone will pay for?
- What can I do particularly well now or that I have done in the past?
- Who can provide me with honest feedback regarding my strengths and weaknesses?
- What is the economic forecast, both the good and the bad, as it relates to my life and my work?

Step 5: Create your goals. As a last step, identify goals that align with the core values you identified earlier. For example, if you identified professional growth or leadership opportunities as values, you could include a career-related goal on your list. Under each goal, include specific action steps and a time frame. Your goals can be broad (grow my career), but your action steps must be specific and time-limited (get a new job in the next three months). I strongly recommend limiting the number of goals and action steps so you can take a realistic approach to what you will accomplish. Typically, three or four goals with one or two actions steps under each is doable in a year.

Step 6: Determine what support you need to stay accountable to your plan. Identifying an accountability partner, perhaps a colleague or good friend, can help you stick to your plan. Agree on a regular time to check in (it could be a 10-minute call every other Friday). Or schedule a time weekly, biweekly, or monthly to review your personal strategic plan on your own and allow for modifications.

Determine Your Area Of Excellence

Finally, in personal strategic planning, the aim is always to achieve leadership in your chosen market niche. Business leaders have the authority to determine the area of excellence in their business. Analogously, on a personal level, you can choose the thing at which you're going to become absolutely excellent and achieve extraordinary results. So in what areas are you going to work to achieve results that are far beyond what the average person could be expected to accomplish?

You were put on this earth with a special combination of talents, abilities, and personal skills that make you different from anyone who has ever lived. Whatever you're doing today, it's nowhere near what you're really capable of doing. The key to a happy and prosperous life is for you to regularly evaluate your strengths and weaknesses, to become very good in the areas you most enjoy, and then to throw your whole heart into what you're doing.

Here are some final tips based on my observation of what my most successful clients do:

- Focus on what is within your control, as opposed to things you cannot control.
- Highlight the positive outcomes that change will bring.
- Reduce your plans rather than overcommit, set weekly and daily milestones, even if they are small, to see progress.
- If your focus is on making more money, remember a wage or a salary is merely an amount of money that is paid to purchase a certain quality and quantity of labor or output. The results that you're able to get by applying your personal skills and strengths largely determine your rewards in life. If you wish to increase the quality and quantity of your rewards, you have to increase your ability to achieve more and better results.

Creating a personal strategic plan can be transformative. Realize that some changes happen quickly, while other habits take a whole lot longer to stick. The key is to be patient with yourself and know you are moving in the right direction.