

# Strategic Planning for One



Mapping a path to your professional Vision

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Right, here you are then. Where to now?

A swag of recent client conversations have been eddying around my head, poking me to think more deeply about the gap between those on the professionally-fulfilled-&-kicking-goals side of the ledger, and those looking at their shoes in a lonely, confusing back pocket somewhere. In doing so, a disconnect became apparent. Consider this question...

*"Is the success of your employer / organisation more important to you than your own personal success & professional growth?"*

(On a limb, most of you answered "no.")

Well then *why*, if the collective of clever folk in your organisation have deemed it smart practice to develop a strategic plan of some form to get them to *their* chosen vision, goals or happy place...

.. why don't you have one for your own career?

I'm not talking about your 12-month sales plan or a cut-and-paste vision board or your key client leveraging strategies.

No, I'm talking about you. Building a compass and hand-sketched mud map to navigate you to *your* version of long-term success. Enunciate *your* growth aims. Defining *your* chosen pathways to get somewhere than means something to you.

Boards hold strategic planning sessions because it provokes them to think broadly and deeply about how their organisation is going to thrive & deliver shareholder value through making good choices. Their consideration and selection of strategies lets them analyse risk, options and alternates, and it gives them something sound to plan under and measure against and govern. It's a wisdom-applying, vision-seeking, course-charting approach to help you achieve your desired outcomes.

Why then don't we do this exercise for ourselves?

Short of forming a Board of Directors to run You Inc., let me try giving you a means to develop a **Strategic Plan for One**.

Over the next 42 + 1 chapters, I'm going to take you stepwise through a strategic planning process that's all about you. From historical analysis to your Vision and Values to reviewing trend winds and a raft of trajectory options, we'll build bit-by-bit to give you something simple, something clear and something that represents where you want to go and, until tomorrow's history tells you otherwise, how you'll go about getting there. And to seal the deal, we'll stick in some discipline pegs to ensure your own good governance of your plan.

We'll begin with a look at your past plans, and along the way, I'll provide you with some simple tools you can apply the thinking to (but as always, if you've got a better way or customised toolkit that works for you, then go nuts with it). And, as a bonus brownie point benefit to you, if you'd like to share this thinking with others, then please forward this instructional on for free, or just have your chums email me for copies.

**Strategic Planning for One** - let's get you hitting the new fin year with a sense of purpose and some well thought through routes you can traverse to fulfil it. Happy travels...

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## Strategic Planning for One - 1. Reviewing your past plans

OK, let's build you your very own Strategic Plan for One.

Before we dive headlong into Vision & Value setting, terrain analysis and checking out the pathways you have open to you, we first need to plant our feet firmly. To galvanise your belief in the importance of developing and utilising strategic plans to get you where you want to be. This can't be 'entertainment' for the passive. Ironically, this might be the early exit for some of you. Better now than when the bus is clicking along at a rate. So let's take a quick look at your planning history - what you've built, how you used it, what paid off and what didn't...

\* **Your profession** - at some point you made a conscious choice to pursue the career you're in. You thought *"I have a lifestyle I want to fund and enjoy, I want to be somewhere that's rewarding and meaningful and gets me spending time with people, processes or products I connect with, I want to make the most of my skills and talents, and of the available career options to me, this is the one I think is worth my efforts."* Your journey took some strange turns, no doubt, however there was a point where you said *"I want to work in that space"*, and so you went about making it happen. You did some homework, asked some questions, got your CV together, made some approaches, ask for chances, refined your pitch, underwent an interview or 60, and at some point, hey presto, you find yourself doing what you do today. Take your mind back to the moment you landed the career-defining gig, or when a tap on the shoulder came to further propel you down this professional pathway... what did it feel like?

That feeling? That was borne out of your planning.

\* **Your life partner / tin lids** - you didn't just meet last Tuesday and say *"hey there stranger! Let's shack up!"* From hitting the club in your finery or jumping on eHarmony to that first glimpse to a first kiss to a series of staged moments that brought you closer and closer to the lifetime commitment, you made a row of strategic choices with a little voice in the back of your brain going *"I kinda know what I want, and this'll test if this is meant to be or if I want it enough"*. If you're fortunate enough to have little-un's, you're continually thinking about the type of humans you want them to grow up to become, and so you map out choices and pathways about schools and role-modelling practices and chores and pocket money and social groups, all in the name of helping them get to where you want them to be (happy, kind, capable). Sometimes the choices pay - you're blissfully married, the kids are kicking goals. Sometimes they don't - it didn't work out, we're having problems. And you reassess. Back to the drawing board... is the Vision still what I want? Are the paths I'm taking to get it proving to be valid or vexing? What'll I try now? For the big stuff, the really important stuff? You strategise and plan.

\* **Your castle** - reviewed your budget? Check. A measure of confidence in future income stream? Check. Consider the location. Think about your current and future needs. What you'll have to sacrifice to make the mortgage. Proximity to shops, schools, your place of work. Who'll finance it and how you'll structure a 25 year mortgage that doesn't kill you (and can we budget some holidays while keeping the payments up?) The choices go on and on - you've strategically planned where and how you live.

\* **Your work** - most of you have business plans of some form. Even take part in your organisation's strategic planning process or own some of the plan elements. So ask yourself what does and doesn't work;

... building them in a day then sticking them in the drawer for a year?

... turning them into aspirational posters you stick around the place as visual reminders?

... using them at meetings as agenda items?

... saying *"we did that exercise, it'll please the boss, it's not really reflective of what I plan to do, but that's OK, as long as we make the number..."*?

... copying the competitors?

... not having one (*"we'll fly by the seat of our pants, the market's changing, we'll be fine because we're smart"*)?

Take a look back and think about what got you further, faster.

The key point I'm trying to create an echo of here is that this idea of strategic planning isn't a foreign process to you.

You have planned with success before.

You've considered pathways and made strategic choices based on the information you have or went about finding.

You've dealt with things that changed the plans, in little and in major ways.

You've used a Vision as your endpoint while you've navigated the day-to-day travails that test your resolve.

You've no doubt gotten lazy with plans before, and seen the lack-of-focus consequences and time wasting and strange side road travels that result. Sometimes the freewheeling feels fun and interesting. Often it's futile and not in the interest of what you said you want.

You're not necessarily convinced there's "*one way*" to plan that'll always work for you... but you'd love it if there was.

(There's not. Sorry.)

And, sitting here now, considering your career and the busy professional life you're leading and the sense of overwhelm that so many life pressures are placing on your shoulders, you're wondering if putting a personal strategic plan is worthwhile, even do-able. Worth the bother.

Look back once more at where you've set yourself a big goal that really meant something to you.

Think about how you picked a path from a number of paths and decided on a number of steps you'd have to take to get yourself there.

Remember the power of having something meaningful, palpable in your head when a distraction presents or you're given the chance to take immediate gratification at the expense of your longer-term success. You sometimes give in, and you sometimes hold your line. Regardless, having the longer-term Vision there forced you to at least test your want. And when it comes off... Wow.

So this personal strategic plan thing?

It is do-able.

And it is worthwhile... if you really want something enough.

Ready to put yours together?



## Strategic Planning for One - 2. Drafting your Vision

To the blue sky then. The highest order\* piece of any Strategic Plan - the Vision Statement. You've seen and heard the corporate vision phrases;

*"To be the ..... in our market."*

*"We will achieve ..... by ....."*

*"Creating .... for our ...."*

*"Grow our .... to ....."*

*"Lead the industry in ....."*

*"Shaping brighter futures for ....."*

The biggest of goals sometimes induces eye rolls or so-what shrugs from audiences listening to the MD's stump speech, and even at Board and senior leadership team level where it's all-care-all-responsibility, setting the Vision Statement (as powerful as it can and should be) generally makes for many frustrated heads debating semantics. Most just want to be done with the puffery so they can hook into the business of what we're going to do, how we're going to do it, when, and what's the payoff.

And there's the close of the loop most miss. What's the payoff we're after? What will we measure our success by?

If you think about it, there can really only ever be one ultimate payoff that makes you truly satisfied. One that matters and that gives you the sense that 'we did the right things, and we did them right'. And that is the attainment of your Vision measure.

*"Did the things we did actually help us achieve (or take us a big step closer to) the Vision we defined for ourselves?"*

The beauty of Visions is they are intensely personal. There is no right or wrong one. It's a choice. Defining where you want to get to, what you want to be, what you'll place priority on and make hard calls to achieve - you get to choose it for yourself. Craft your own Vision of a future that'll make you satisfied. It is the ultimate and, together with your Values, most important decision-making filter you have.

What follows this chapter is a simple tool to help you craft your draft. Or use butchers paper. Or a beer coaster. The vehicle is less important than the thinking and framing. You'll see I've employed the visual metaphor of a sun hidden behind trees. I like it because it's often really hard to get a clear view of what your Vision for your career is. Is it a particular role you want to be in in 5 years time? A status or standing in a market space? A cash number in your bank account or a recognised expert in a domain? It's tricky - sometimes you want it all. They might all play a role.

One way to help you hone in on the most important bit of the Vision is to consider the sun's rays peeking beyond the obstacles - the warmth and who it will touch if you achieve it. Hence the other boxes you might consider - who'll be impacted by your Vision attainment and how that'll make you feel.

\* **Your employer** - or business. By you getting to that place in the sun you've defined, how will they benefit? What's the logical outcomes and upsides for the crew paying your salary and giving you the vehicle to deliver your magic?

\* **Your customers** - internal or external, those you spend your days trying to help and serve. By you achieving and making decisions to get closer to your Vision each day, how will their lives improve, be made easier, less painful (and in turn, perpetuate your greater success)?

\* **Your friends and family** - if there are opportunity costs you'll have to endure to get airborne and Vision-bound, what's in it for them? Will the upsides to the most important people in your world fuel your energy to pursue it?

\* **Your community** - be that a market, town, country, generation or Rotary Club... how will you getting to your Vision help them and their causes? What legacy will it leave them with or benefits they can further scale for a greater good?

\* **Finally, You.** As a human being, with physical, emotional, security, social, growth and esteem needs, what can you see this Vision achievement doing for you?

The other tricky bit about Visions is **timelines**. Is it a 3-year goal that needs reassessing regularly when we tick the box? Is it a universal that won't change regardless of where I am and which interim goals I'm achieving?

I'm afraid that's up to you. There's no rule with this. It's YOUR Vision. I would counsel you to set a clear, punchy statement that stands to endure some shifting sands - something that won't buckle at the first setback or organisational restructure or fiscal downturn or passing trend. It needs to be something you can fix your eye on as the waves go up and down, that gives you a compass reference point and that, in light of what it can do for other stakeholders of importance to you, will be worth some short-term pains and displays of resilience.

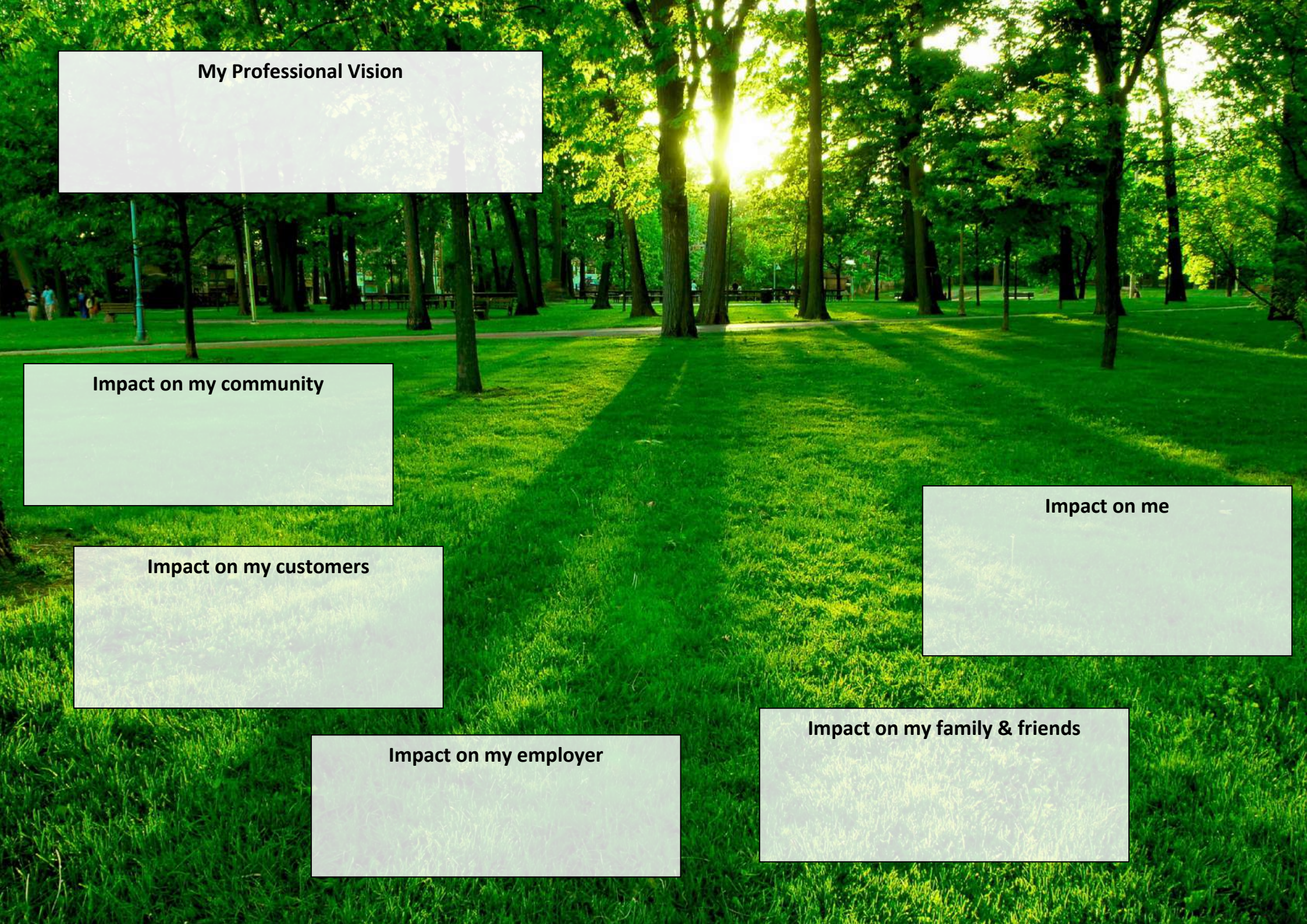
You've got to really want it. Or it won't work for you as the decision-making filter your strategy needs.

We'll test it in a little while - see if it's 'real'. For now, set yourself a draft version. If you want to send it to me and have yourself 'poked' about it now and then (confidentially of course), feel free.

Now you've got a Vision - the "what" you're aiming at - we can move to the "how" - the Values you hold dear and will inject into every strategy and plan you develop. Onwards...

(\* In a corporate setting, there is one higher order piece - defining the 'Core Purpose' of your organisation. Why you exist. Why the company has been set up. It's a little different at human being level... have no fear though, we're coming back to it...)





**My Professional Vision**

**Impact on my community**

**Impact on my customers**

**Impact on my employer**

**Impact on me**

**Impact on my family & friends**



### Strategic Planning for One - 3. Drafting your Values

The other yardstick we use to judge if our life is rolling along in the way and direction we want it to - our **Values**. To have the Vision is to define the what you're aiming to reach or be. To have clarity around your Values (professional? personal? I'll argue they're the same...) is to know how you believe you should behave en-route.

Values, like your Vision, aren't really things you can copy or aspire to live someone else's. They're pretty fundamental, ingrained beliefs you possess that, when you're aligning your decisions and actions and crowds with them, give you that magnificent sense of *"life is good!"* And when you're not? When you're working in ways that rub against the grain of what you truly believe to be right or true to yourself, then chances are you're feeling flat and morose. It's hard and stressful and there's that frustrating sense of emptiness that comes from superficially wanting to have or do something that others have or do (but somehow, unspoken or unpopular as it may be, you just know it's not quite right for you).

Sarah Pavey from mindtools.com offers a simple 6-step process for defining your Values;

- 1. Identify the times you were happiest** - in your work, but also at home and at play. What were you doing? Who were you with? What do you think was underpinning it?
- 2. Identify the times you were most proud** - why? What did you do or achieve? Who shared in it or contributed to it or was the reason for you feeling it?
- 3. Identify the times you were most fulfilled and satisfied** - different to 'happy' which can be passive, satisfied is often borne out of labour. What did you do to get it? What need or desire within yourself did you fulfil? What scenario gave rise to you working to achieve this sense of satisfaction?
- 4. Determine your top Values based on your experiences of happiness, pride & fulfilment** - think about why each of your memorable experiences came about and what was truly important to you in each of them. Take a look at the below list from Pavey and see if you can come up with about ten that fit with your behaviours and beliefs. You might find some natural overlaps - see if there is a common term that, to you, covers a few others. And, like I did, you mightn't find the term on there that you're looking for. That's OK - make your own up. The list isn't exhaustive.
- 5. Prioritise your top Values** - this takes a fair bit of self-reflected honesty, and it's the most important bit of all, because it's what's going to create your decision-making filter and give you a hierarchy you'll use to resolve decision-making conflicts. Try ranking them in order of importance, then litmus test. *"If I had a situation where I could only make a choice consistent with one of these two values, which one do I naturally gravitate to?"* Do this for all of the Values, and give yourself a ranked ladder.
- 6. Reaffirm the Values** - run your eye down the list, especially the top 3 or 4. Do these Values make you feel good about yourself? Are you proud of the top few? If you went against them, would it just feel wrong? Would you be comfortable and proud telling them to people you respect and admire? And do they represent things you would support, even if the choice isn't popular and puts you in the minority?

Pavey says making Values-based choices isn't always easy, but it embodies a common value many put on their list - integrity. Professionals with integrity make Values-based choices.

Invariably, when you've made activity choices - as recently as yesterday - that were at odds with your Values, you didn't feel the mojo. When however an act you undertook clearly put you a footstep closer to your Vision AND it was carried out in a manner consistent with your fundamental beliefs, you were pretty cock-a-hoop. The idea that you can have one set of Values in your professional life and another in the extra-curricular playground is, I think, fanciful. They're in your DNA (or superglued to it). They're influencing your choices whether you like it or not. Be clear about them, conscious of them and use them proactively. Critically, decide if the Values your business embodies (not what's on the wall - what the business *actually does*) are congruent with yours.

The challenge before you - be that professional of purpose and integrity, and use your Vision and Values as the first overlay on each day's task list. Will it help me get closer, and are the actions consistent with what I'm about?

Accountability	Excellence	Perfection
Accuracy	Excitement	Piety
Achievement	Expertise	Positivity
Adventurousness	Exploration	Practicality
Altruism	Expressiveness	Preparedness
Ambition	Fairness	Professionalism
Assertiveness	Faith	Prudence
Balance	Family-orientedness	Quality-orientation
Being the best	Fidelity	Reliability
Belonging	Fitness	Resourcefulness
Boldness	Fluency	Restraint
Calmness	Focus	Results-oriented
Carefulness	Freedom	Rigor
Challenge	Fun	Security
Cheerfulness	Generosity	Self-actualization
Clear-mindedness	Goodness	Self-control
Commitment	Grace	Selflessness
Community	Growth	Self-reliance
Compassion	Happiness	Sensitivity
Competitiveness	Hard Work	Serenity
Consistency	Health	Service
Contentment	Helping Society	Shrewdness
Continuous Improvement	Holiness	Simplicity

## (What are your values?)

Contribution	Honesty	Soundness
Control	Honour	Speed
Cooperation	Humility	Spontaneity
Correctness	Independence	Stability
Courtesy	Ingenuity	Strategic
Creativity	Inner Harmony	Strength
Curiosity	Inquisitiveness	Structure
Decisiveness	Insightfulness	Success
Democraticness	Intelligence	Support
Dependability	Intellectual Status	Teamwork
Determination	Intuition	Temperance
Devoutness	Joy	Thankfulness
Diligence	Justice	Thoroughness
Discipline	Leadership	Thoughtfulness
Discretion	Legacy	Timeliness
Diversity	Love	Tolerance
Dynamism	Loyalty	Traditionalism
Economy	Making a difference	Trustworthiness
Effectiveness	Mastery	Truth-seeking
Efficiency	Merit	Understanding
Elegance	Obedience	Uniqueness
Empathy	Openness	Unity
Enjoyment	Order	Usefulness
Enthusiasm	Originality	Vision
Equality	Patriotism	Vitality

## Strategic Planning for One - 4. Reviewing your past choices - Pluses, minuses & cul-de-sacs

Without wanting to lull you into a false sense of security, you've done the most important bit of lifting. Defining your professional Vision and clarifying your top professional / personal Values (draft versions at least). Well done. Everything else we do in these next 38 chapters? It's all in the service of them.

Before we start looking at the options you've got to take you along routes righteous for you, let's give your future choices the benefit of hindsight as it applies to your professional strategic decision-making history. The good, the bad and the barren.

(A little tool to help you if you like follows this chapter).

### **Strategic decisions that worked:**

Cast your mind back over the past 10 years or so (take your Ginko first if it'll help). Think about the professional roles you've been in, the projects you've undertaken, the VIP's you've elected to serve with priority and the collaborators you've chosen to surround yourself with. Now think about what's really worked well for you. It might be around the decision you made to...

- \* Start or participate in an industry networking or representative group
- \* Take on a course of training to become an expert in a niche area
- \* Model yourself on the practices of someone you admired
- \* Champion a particular process change in your business because you could see where it might take you
- \* Differentiate how you carry out and present your offerings
- \* Take a role because you could see the next role it would prepare you for would be a real game changer
- \* Dump redundant practices or folk or even an industry because you saw the writing on the wall early enough
- \* Hold your line on a matter when others were screaming "Turn the wheel!"

You get to decide your version of 'successful' here. Was it a genuine step forward in the progress towards a meaningful goal for you or gave you that sense of fulfilment that comes when you move in a way that's consistent with your Values? Did it benefit others who've thrived as a result? Did it create a platform that you're damn glad you're able to stand on today in these windier times? Audit the past 10 years and come up with 5, 6 or 7 "big strategic decisions" that you think genuinely paid off for you.

### **Strategic decisions that didn't work:**

Sometimes we get it wrong. Don't brush them off too quickly. Call them for what they were - dud calls. Where you...

- \* Picked a position on a certain topic that history says was ill-fated
- \* Took a role that set you back or caused you more pain than gain
- \* Spent time in research or practices that are now redundant
- \* Formed a posse or played in circles that ended up toxic or deleterious to your professional health
- \* Persisted with a line that you should've dumped, or dumped a line that it now seems warranted some resilient focus
- \* Went left when the market went right (and turns out the market was right)

It's OK. It's over with (right?) Take a moment to catalogue the few biggest raspberry calls you made as you navigated your way along your professional alps. Because truthfully, they're likely better than...



### **Strategic decisions that went no-where:**

The cul-de-sac choices of your career in the last decade. Where your selected street just looped back on itself infinitely. No joy of success, no pain of failure, just the empty nothingness of wheel-spinning.

\* The choice to ride out the long, long storm that just isn't going away

\* The decision to wait for a circumstance to arise, a product upgrade to hit the shores, a person to change their spots, a boss to appreciate you, a team member to finally 'get it' or Godot to appear.

\* Taking a position of passivity when the only way out of purgatory or clock watching was to do something different.

(Interestingly, cul-de-sacs rarely come about when you make active change choices. You might get it wrong, but if you're continually deciding, you're rarely stuck fast.)

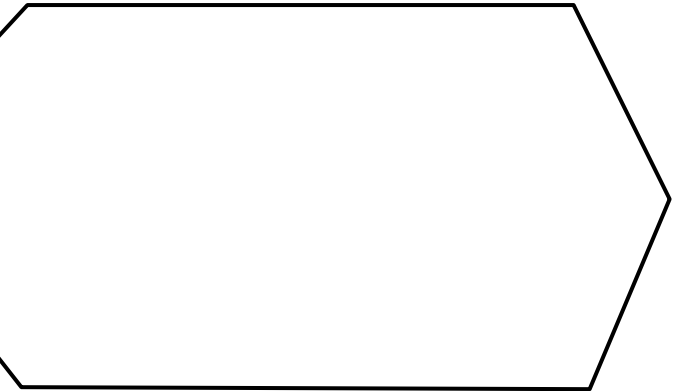
Today's aim isn't to get you to have the epiphany moment of pattern recognition (though that's a nice side effect). Merely to get you to form a short, concentrated catalogue of the biggest decisions in recent history that paid, that stank and that got you bogged.

Your major  
professional choices  
in the past 10 years

Strategies & paths that took you to a better place...  
That you deemed 'successful' ...

Strategies & paths that took you to a worse place...  
That just didn't work for you or were 'unsuccessful'...

Strategies & paths that took you nowhere...  
That circled in a cul-de-sac with no meaningful progress...



## Strategic Planning for One - 5. Reviewing your past choices - Lessons & patterns

Now you've considered what you're aiming for, what you value, when past strategic decisions paid off and when they left you chasing your tail or further back in the pack... now to look for the lessons and recurrences.

Wisdom mining is a discipline. Too many think it'll happen automatically - "life'll just learn me stuff!" However those that actively sift through the data on their choices and consequences and what it all means have a much more solid foundation for future path selection.

Consider a few dimensions of the high point and poor outcome strategic choices you identified on Friday to analyse more thoroughly;

\* **Peeps** - when the choices paid off, was there something about the people you involved or avoided? When they didn't go your way, what was the human involvement and are there patterns cropping up? Were your best results borne out of go-it-alone trailblazing, or did group engagement and team utilisation underpin the successes?

\* **Timing** - did the great stuff come about via bold just-do-it choices, or stewing and consulting widely and employing a longer incubation period for your decision making? Did the best results come from astutely observing shifting winds in a space, or from gritting your teeth and battling through fog and difficulties?

\* **Detail** - was it putting your project through the nth degree of testing and rigour that saw it take flight, or was it more about getting moving fast, furiously, and the shape will form as we travel? Was the value you realised a function of I-dotting, t-crossing and labouring over the specs, or did you blaze a trail in an unknown space devoid of detail?

\* **Coin** - did it pay when you paid close attention to how it would pay you and others? Have your crashes been catalysed by taking your eye off the cashflow? Has nit-picking over short-term payoffs gotten you a better or worse long-term result, and has investment in longer-term outcomes paid dividends for you while you tightened your belt and survived on bread and dripping to get the big pot down the way?

\* **Image (or "brand" for the marketers)** - did you give a rats how others would view you as you made a selection? How deeply did you consider how this would look as you made your pick, and did this broader implications focus generate better or worse results? When you got it right, was your decision a good, logical fit for the brand and how others see it, and when it went bad, was there misalignment between the choice and what others would expect from you?

\* **Finally, you** - how well did you know yourself, play to your strengths and navigate a way around your weaknesses in making a choice that paid off? When it went belly up, were you being honest or aspirational (deluded?) in the type of human being you are? Did the best results come out of an energy and happiness that you put into the work, or a doggedness to prove others wrong, or by being emotionally detached from the outcome? If we asked "*what patterns emerge about you as a human being in these strategic choices and what they delivered to you*", what becomes most apparent?

There's a lot of text books you could spend years pouring over that won't give you anywhere near the real, accurate information that some self-analysis around your strategic decision making history will deliver.

Stand before the mirror for 10 minutes today and review your lessons and patterns.



## Strategic Planning for One - 6. Reviewing yourself - Strengths & weaknesses

Regular readers and attendees at my workshops will know my fondness for quoting the #1 research finding of The Gallup Organisation - that people don't or can't change all that much. As golfer Lee Trevino said, "*You gotta dance with who brung you.*" In other words, the skills, traits, biases and talents that make up the unique creature that is you... well, like it or not, that's what you've got to work with. Less hoping and praying to be more like Mike; more being honest about and utilising what's already wrapped up within you.

Consider your strengths and weaknesses in the following five areas;

**1. Human interactions** - how well do you read people? Does picking up on subtleties and tonal undercurrents in conversations & body language come easily to you, or do you need to be smacked in the face to recognise the obvious? How about negotiations - are you regularly able to find a position of advantage to you and navigate conversations that preserve and defend the upside you need, or do you cave and give too much away when pressured by a strong opponent? Are you naturally empathic? Do you make friends easily? How clear are you in expressing your own needs and wants, or getting to the heart of others? Do you have a filter on your mouth, or are you more speak-first-consider-later? Can you small talk with purpose, or does a desire to get to the point see you occasionally pigeon-holed as impatient or prickly?

**2. Self-discipline / willpower** - are you someone that can readily say 'no' to the first marshmallow in order to get the second one down the track? Does delayed gratification make sense to you? Are you practiced and talented in the science of setting clear goals, identifying the opportunity costs you'll need to pay to get you to them and then firm in resolve to stick to the longer-term plan? Can you say 'no' to distractions? Or are you more naturally prone to shiny object syndrome, slaking an urgent thirst and taking the smaller immediate win over the larger but who-can-wait-that-long result? Are there patterns of consistent, future-focused decision making in your career, or do you find yourself making more whimsical scenario-specific calls that don't follow a single theme?

**3. Logic & reasoning** - do you quickly and easily see the return-on-investment upsides and the contrasting payments that must be borne to achieve them? Is mentally walking through the clutter and complexity something you do rather well, or do you more often struggle to see the wood for the trees in complicated scenarios? Is sorting the pros and cons into columns and priority rankings something you naturally find yourself doing when confronted with a choice, or are you more gut-feel and pick-the-one-that-sits-right? Do you think far down the road, or just until the day's end? Will you more often let head win, or heart? Are you systems, or she'll-be-right?

**4. Flexibility** - have you voted one political party all your life and gotten the same haircut for the last 10 years, or do you judge people, products, predicaments (and perms) on their merits, at the time, case-by-case? Can you be readily persuaded by a sound counter-argument, or are you a heel-digger-inner? If Plan A shows itself to be unlikely to succeed early on, will you naturally shift gears quickly to try bolstering its chances, or do you regularly find yourself pushing a wobbly trolley on and on until something breaks? Do you get what 'sunk costs' are? Are you continually and actively looking for ways to 'break' your own model before the market does, or will you leverage the life out of something until you're left with no choice but to reinvent?

**5. Leadership** - are you a trail-blazer? Do you love being the first-step-taker, relishing the opportunity to be first into a firing line, OK to carry the burden of risk for the buzz and benefits the flag waver enjoys? Or would you rather others step into the fray first and, if someone shows you it might be somewhat safe, find you then gravitate to joining them and supporting the mission of another? Is yours the first hand to go up when someone asks for responsibility to be taken? Do you like creating, inventing, challenging staid models? Or do you prefer the harmony of crowd wisdom, the part-drawn canvas of another that you can put your talents onto when someone's said "this is worth our efforts!"? Do you back yourself with an unshakeable belief in your own capacity (justified or not), or is your risk profile more suited to collaborative consensus conversations on the way forward?

This is of course highly subjective, and you'll put your own rose-coloureds on as you consider where you sit in these 5 (not exhaustive) domains. If you want a more comprehensive index, try Gallup's Strengthsfinder model (online, or read "Now, discover your strengths" by Marcus Buckingham). You'll likely have your own terminology - words others have used about you before or that you like (or are stung by) hearing about your approach. Consider the learnings you mined yesterday - what were the strengths and weaknesses you believe you possess that came into play in these moments? Catalogue your top 3 - 5 - use this simple tool below if it helps.

The key here - be as honest with yourself as you can about what comes naturally (beneficially) to you, and what you just aren't as talented at. Any strategic plan that's going to work for you has to factor in your biceps and Achilles heels if it's to have any chance of success.

# Strategic Strengths & Achilles Heel Review



Professional strength...

Build & flex ideas...



Professional Achilles heel...

Crutches to support...



Priorities:

Support to explore:



## Strategic Planning for One - 7. Reviewing yourself - Gap analysis

With the analysis of your professional strengths and weaknesses comes the opportunity to put them in the context of your Vision and Values. In other words, *"do I currently have what it takes to realise that Vision and live those Values each day? And if there's a gap between what I have, am or am doing, and where I need to get to in order to be that person of purpose and integrity that so appeals to me, where can it most easily and effectively be crossed (and what bridge will I need to build to cross it?)"*

Following this chapter is a tool to help you navigate and consolidate your thinking.

Before proceeding, a couple of key points about gaps. First, they exist. If they didn't, you'd already be at the Vision and be behaving like the ultimate role model of your Values (and you're not, are you?) Second, you have to own them as your own, not blame other people, systems or limitations. It's your gap, no-one else's. Third - you will never pull the islands of "where I am now" and "where I want / need to be" together. The best you can hope for is to find the skinniest point of the crossing and build a solid bridge to get you over in a key area. And finally, while the bigger strategic plan we're going to work on for you in the coming chapters is all about helping you get where you want to be, there are still little tactical things you can get cracking on immediately to narrow or rope-swing across some gaps and give you a little momentum. Here's where we are then today.

Consider 5 key elements of what you do, and on the tool, jot down one or two key positive aspects of your game next to the smiley faces (things you're doing well at) and a couple next to frowny faces (not so good with);

- 1. People stuff** - interactions, negotiations, leadership, collaboration, understanding, building friendships, earning trust, being a team player... what are you doing right now that's positive and effective, and what's less so?
- 2. Planning stuff** - day-by-day, longer-term, career, retirement, work-life balance, utilisation of the tools & crew you have or could recruit, mapping out money and movement in line with your dreams and realities, sales, key account, time mapping... where are you strong, and where are you falling down in your planning?
- 3. Implementation stuff** - doing what you said, starting, finishing, following-up, delegating, recruiting, empowering, self-discipline practices, eating the frog, time management, following the SOP, DIFOTIS, having the meetings, asking for business... what powers your success, and what's eroding it?
- 4. Wisdom stuff** - knowledge, intel, history mining, domain expertise, connections, process navigation, efficiency, self-directed learning practices, formal study, asking the right questions continually, soft skills... where are your talents and greatest limitations?
- 5. Innovation stuff** - finger-on-the-tech-pulse, industry directions & applications, early adoption of change, driver of change, creativity, thinking deeply for better solutions, benchmarking within & beyond your space, forum involvement, test-driving new ways, seeking out alternate perspectives to challenge your own... where are you kicking goals, and what's not in your playbook right now?

That's where you believe you're at right now. The next step then is to consider the 3 most important, potentially achievable levels you believe you need to get yourself to within these areas. Develop a couple of key words as 'position statements' for each. For example, for "People Stuff", if your Vision is something to do with leading a multi-disciplinary team to a success point, you might have;

- \* Collaborative, clear leader
- \* Enabler of broad skill sets
- \* Communicate the vision with conviction

For "Implementation stuff", it might be;

- \* Daily Top 20 VIP contact

- \* Ask conversion questions

- \* Train my 2IC for delegation

If for example one of your Values is "Creativity", you might weave that Value into each of the 5 domains - for example, "Build a book club" in your Wisdom domain and "Set up tech advisory team" in your Innovation domain.

Do the same with each of the 5 domains - what are 3 key points you think you need to get to with people stuff, planning stuff, implementation stuff, wisdom stuff and innovation stuff to be confident you can achieve your vision and be living your values?

Finally, take a look at the gap. It might stick out like canine proverbials, it might take a little interpretation, but what's the one area you're going to have to cross or do something about to get from where you are today to the desired points? Got it? (Quick, while we've got you deep in the important stuff... what's the first action that comes to mind to get you moving across this gap? Something you can start immediately? Write it down - it might be raw - we'll come back to it later in the process...)

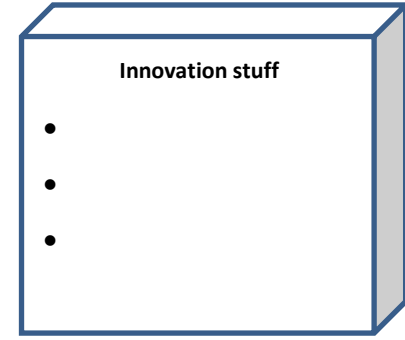
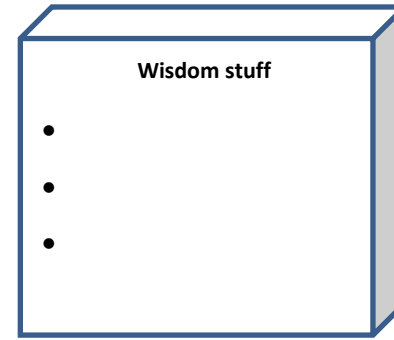
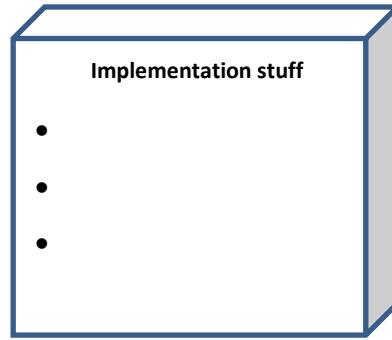
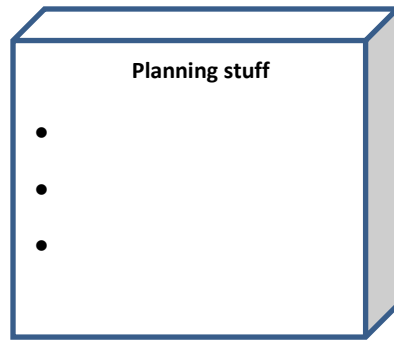
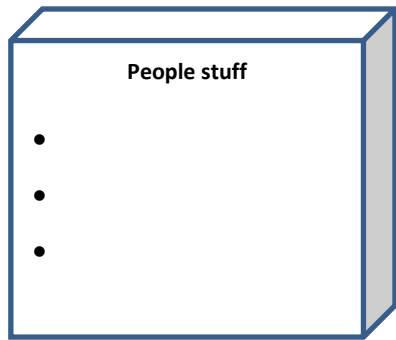
Well done - a challenge, this one. Vital though if you're serious about changing to get and be where you want to be.

**My Vision**

**My Values**

Name -

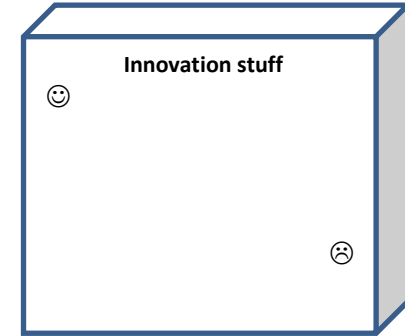
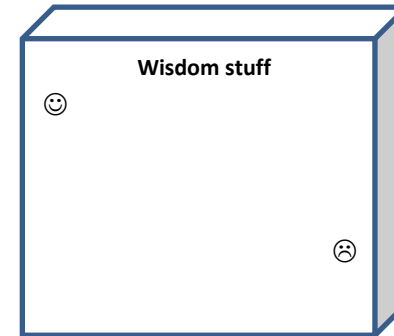
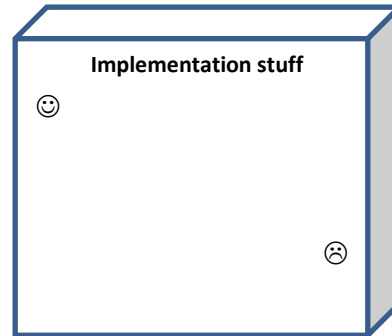
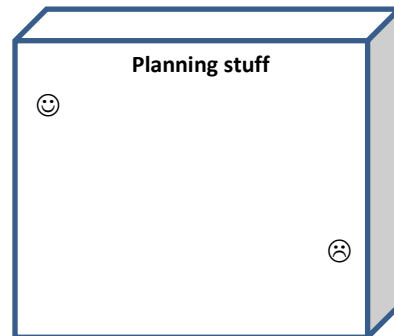
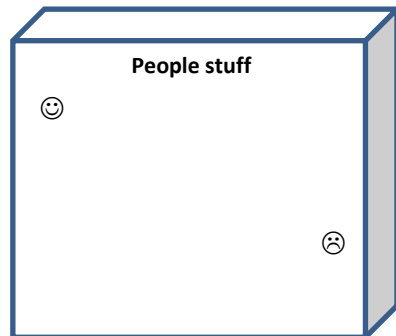
Where I need to be if I'm going to get to \_\_\_\_\_ and live my Values each day of \_\_\_\_\_ .



**The Gap**

& 1 action

to cross it



Where I'm at right now.

## Strategic Planning for One - 8. Reality Check 1 - Vision & Values

If you took 10-15 minutes and followed the process mapped out in the previous chapter - defining the reality of where you're currently at in key domains, considering where you'll need to be to achieve your Vision & live your Values, and then identifying the most obvious gap to cross (and maybe even thinking about the bridge structure to cross them), well then, you put in. (Onya!) Now, I anticipate some of you didn't (I know, psychic, right?), so here is a make-up moment for you. Be an individual of integrity - do today what you said you'd do when you committed to taking this Strategic Planning journey for One. Invest the 10 minutes. The other stuff in your diary is really not more important than choosing your future, is it?

If you did do it, and if you're really serious about this bold and game-changing series of professional success exercises, then this chapter is a wonderful reality-check moment for you. A chance to really think through & acid-test that Vision and those Values you drafted up earlier. I make no apologies for pulling you back to them again (I know you want to plan! Hold your horses! This, I swear on my football team's future success, is worth the extra time at 35,000 feet...).

Consider the few thought trains we've taken to this point, around your history, your strengths, your lessons learnt and the gaps between your current gait and desired stride. With all those things in mind, are you CERTAIN that...

- \* The Vision you've written for yourself, in a single, clear, unambiguous sentence, is absolutely what you're willing to pay any manner of prices to achieve?
- \* Can you still see, in light of the background and self-analysis, that, with the right tail winds, market movements and a few nods from lady luck (inspired by your sweaty, gritty effort), this Vision could actually be achieved by little-old you?
- \* Is the Vision something that's consistent with and befitting of a person embodying the Values you said are so important to you? Can you easily picture the person at that Vision realisation point being a world-class role model of those Values? Do the two fit?
- \* The Values themselves - do you love them? Deeply? Like water? If someone offered you a job today paying \$10M a year for 10 hours work a week in a space you think rocks, but it required you to compromise on those Values... would you turn it down? And if you wouldn't, what Values WOULD you turn it down for?

Grab these higher order pieces. Shake them. Stare at them. Decide how much you love them.

OK - any syntax changes needed? Rewords? Make them now. Don't persist with any more planning if you're not sold on these completely. You'll waste time and you'll fail.

Need further acid-testing? Consider then your to-do list for today;

- \* **Your #1 goal for today** - is it genuinely in the service of the Vision you've set out?
- \* **The top 5 tasks on your list** (look at them now) - will they help you closer to that Vision? If they're not, would you be willing to swap them out for things that are?
- \* **Those same tasks** - are you preparing to carry them out abiding by the Values rules you've set for yourself (or does it require compromising them, or worse, heading in a different direction to them?)
- \* **The people you'll interact with** - if I asked them come 5pm what they thought your Values were (as inferred by how you treated them, role-modelled before them today) - would they get close?

Is there anything at all that you are going to do today, when I point you back towards this Vision and Values idea, makes you go "Yeah, but...."?

There can't be a "Yeah, but...." There really can't. You're either someone of integrity - that pursues a clear, meaningful Vision each day and aligns their behaviours with Values they hold dear - or you're not. I know how harsh that sounds. This isn't for everyone - plenty of places in the pack for also-rans. The whole point of Strategic Planning - picking a

future for yourself and getting off the fence to traverse some uncertain-but-we-think-pretty-damn-good paths to get there - is to be an active decision maker. A definer, not a wave-rider.

It's scary. It's raw. It has to be real if you want it to have the impact I hope you do.

Get behind a Vision and Values that are really, really real to you.

**You want something. Right now, this very moment, you want something... but how much do you want it? How badly do you want it? Do you just kinda want it, or do you **want it bad enough to never quit on it, no matter what?****

## Strategic Planning for One - 9. Present review - Problems you're solving

Sitting neatly between the history you're building on and the horizon you're aiming at lays the ground your feet are touching this very moment. The present. This chapter is about considering the problems your professional efforts are currently fixing - where the source of much of your value is being derived.

Three axes for your contemplation;

**1. Problem types** - when you put your professional super-powers into play each day, what headaches are being removed, fears allayed and friction points greased? Are you fixing a technical problem - something no-one else available has the skills, knowledge or magic hands to deal with? If so, what's the underlying problem that you're resolving by putting in that technical fix? Is it a need for more speed? Reducing the demand for extra labour we can't afford? Will your mend make the business more money through increased sales or cost reductions? If yours isn't a technical problem solution, maybe it's a human resource one? Are your leadership or team support efforts helping a crew collaborate better, gel more readily, be inspired and feel confident to go forth and help more? Are you mending a training problem? Plugging a gap in an imperfect human network needed to get the best outcome? Is it just that you being around playing roustabout enables everyone else to deliver their solutions faster or with more focus? Is your fix a future insurance policy? Do you deliver a pipeline that'd be dry without your labour? Warm up a cold crowd for the next wave to go in and harvest from? Maybe the real problem you're solving is one of trust. Maybe the breakdown of trust in client: supplier relationships, or intra-team interactions is something your efforts each day are healing. Maybe your actions are clarifying a previously muddy and confusing scenario, or helping people cut through and get on the path of their choosing faster, with more belief that they can do it? Whatever you think it is, be clear about the problems your talents, efforts and days are actually solving right now.

**2. Solution recipients** - are the bulk of your professional efforts being applied to fixing pains experienced by your external customers? If you work in B2B, is it actually *their* customers whose problems you're solving? Do your talents go towards making the lives of internal customers better - bosses, colleagues, the sales crew, Mary and Jo in accounts payable? Extrapolate your thinking out a little. If you fix the problem for them, who then feels the next wave of upside from that issue being taken care of? Think secondary beneficiaries and, if you can, even tertiary recipients. As you consider that cascade, ask yourself *"are the bigger pains I'm fixing actually 2 steps removed, and is the mechanism I'm using to get that fix implemented going to be the best one in future?"*

**3. Timescale of benefits** - it's lovely to knock over the day having taken 5 pressing pains off someone's stuff-I'm-dealing-with list. Short term pain reduction often wins handshakes and gratitude. Are there a number of short term (today) problems your work is rectifying? What about a little farther down the track... if there's no immediate pressure-release valve from your 8-hours-of-labour from today, when will the upside of your problem solution be realised? And if you don't see it in a week or a month or 6 months, when, given you're spending a decent-size chunk of your finite lifespan trying to deal with it, will the truly amazing benefits of your solutions manifest?

It's not to say that the problems of tomorrow that you'll apply your strategic thinking towards are a carbon copy of the work or value points you're delivering today. Analysing the problems you're solving right now will however give you a good pointer to where your talents and efforts carry value, what you've got some aptitude and tools and passion to fix, how short-term or long-term the fruits of your labours are able to be enjoyed, and finally just who you might elect to focus your sights on as you decide who's going to bask in the glow of being your problem-solving recipient. Pick the kind of problems you want to solve, for the people you want to solve them for, in a timeframe they'll value and you'll enjoy delivering on.



## Strategic Planning for One - 10. Present review - Challenges you encounter

Here's a checklist of 20 things you might be challenged by on any given workday. As you work your way down the list, ask yourself 3 questions of each item and put a tick or a cross next to it.

1. Is it something that poses a genuine obstacle to me achieving my goals today?
2. Have I found, or do I know an established way to get around, over or through this challenge?
3. Is it likely to remain a challenge (even become more challenging) into the future?

Any strategic plan you develop for yourself will need to factor how you'll deal with the difficulties you'll likely face. Consider then;

1. **Motivation** - are there moments when you think "I don't know if I really want to do this today?"
2. **Task overload** - is the to-do list groaning, lacking priorities, bigger than you can handle?
3. **Competition** - are others trying to cut your lunch, vying for your or your client's attention?
4. **Financial constraints** - are there lower limits to what you can invest than you'd like?
5. **Resource constraints** - are there gaps in the kit, the infrastructure you need to build & deliver?
6. **Product & service constraints** - does your saleable offering sometimes fail or fall short?
7. **People constraints** - are there fewer of the right people doing your bidding than you'd like?
8. **Skill deficiencies** - is the talent that you or your team are putting into work less-than-perfect?
9. **Client access** - is it hard to get in front of enough of the right people to keep the coffers full?
10. **Competing priorities** - are there times when making the "which one first?" choice is hard?
11. **Time "in" versus "on" the business** - do you put "doing now" ahead of "planning ahead"?
12. **Bureaucracy** - is there red tape, duplication and (seemingly) pointless admin work to do?
13. **Personalities** - are there folk you interact with that you just don't like?
14. **Work-life balance** - do you feel the pull of one when you're in the other?
15. **Reliance on others** - do critical people to your success sometimes let you down?
16. **Self-discipline** - do you ever let yourself down by not sticking to the plan when it's hard?
17. **Imperfect processes** - is your 2.0 version of a process inferior to the alternative 3.0?
18. **Convincing people** - is it sometimes difficult to get others to see your way?
19. **Bad intel** - do you ever have to make decisions armed with incomplete or wrong data?
20. **Technology** - does too much, not enough or your frustration with it impede your progress rather than propel it?

When you've run yourself through the list and made some ticks and crosses, take a second look and try identifying the 5 or 6 areas that you find *most challenging*. If they each got a tick for question 3, then these will be worthy of your extra concentration as you map out your routes to the Vision.

The challenges won't all disappear. They might change, they might get tougher, they might just irritate you in their current form forever and a day. You can plan with them in mind though.

## Strategic Planning for One - 11. Present review - Resourcing & deployment

In looking to define how you'll build on the value you're currently delivering and vault over the chasms and broken glass on your roadways, it pays to assess what's in your kit bag right now and how you're putting it into play.

### Resourcing:

Most of us become blinkered to exactly how much we have at our fingertips or are already applying to get us along the professional continuum. Be frank and open-minded as you take stock of what you've got in your corner;

\* **Organisational might** - if you're an employee or owner of a business of any size, there's muscle power behind you. You've got the benefit of a brand and its reputation, a hierarchy of people who systematically interface to deliver more than a collective of disparate individuals ever could, and you've potentially got multiple points of contact with multiple contacts that pay for your existence. You've got infrastructure, geographical or internet presence, administrative capabilities, plus collective wisdom in an array of commercial & technical domains. You've got an insurance policy in other people to cover you when you're ill. You've got a just-in-time sounding board, advisory team and source of inspiration & focus waiting to be employed in your service. And you've got mechanisms that will tick over for a period of time (not long, perhaps) while you explore where the next meals could come from. There's a bunch in your business that you're using each day, consciously or not, that form a key part of the resource armoury that may have a place in your future.

\* **Physical abilities** - if you can drive a car, pick up and speak on a phone, type an email, think about a way to help others, roll up your sleeves and do some labour or even just lend an ear to someone intent on bending it, then you're resourced right up there with the best on the planet. Consider your personal 'special resourcing' bag - physical, emotional, interpersonal or mental talents that you got lucky in your helping of. When you're despairing of the inertia that often accompanies the organisational might resourcing you're blessed with, consider the fact that to move your feet and ask a question takes not much effort. Attitude sits high on your resource pile.

\* **Networks** - you know people. You have connections. You might even lead and manage some (including suppliers). It's part of the value you bring to scenarios, if not for the introductions you make, at very least for the sense of understanding you bring because you've seen or heard about situations like the one before you. Finding answers or collaborating with others or an ability to join the dots via multiple interactions is a resource you enjoy.

\* **Your library** - be it mental or physical, the catalogue of experiences, education and skills you've accumulated is a rich resource vein. Consider not just your very technical, industry- and role-specific library, but the broader reading list you've been exposed to that influences how you think and behave and see the world. Get yourself more aware of what you're aware of.

\* **The place you live in** - with its laws, opportunities, systems and platforms solidly built for desiring individuals to launch and succeed from, be in no doubt - the 'lucky country' is a resource only 20 Million of the 2.2 Billion folk get the full benefits of. Consider what it is about being in the place you are - town, city, market, sector - that makes you resource-rich as you traverse the path to your goals.

### Deployment:

It's one thing to have and be aware of what's in your handbag. It's a whole other thing to know how you do (and how you might) employ your resourcing to get closer to your Vision.

\* As you consider the top 5 projects or priorities on your to-do list, which of your resource allocations are you actively putting to great use (and do you have a track record of doing well when you do this?)

\* Where do you have the clearest resource deployment programs in your business plan right now? If you're confident this is a great deployment of resources, could it be reproduced in other places (and is it likely to have a key part in your progress to your Vision?)

\* Where are you feeling like you're a little 'light-on' for resourcing to achieve a positive outcome? Are there others with those resources that might be important for you to get close to - not just for today, but for what it could prevent in the future?

\* The way you're deploying these resources (the people you're using, the speed you're choosing, the attitude and posture you approach the scenario with) - are you likely to manifest the best from the resource? Does history tell you so? Is there anything rumbling along the ground at present that you can see might change this 'return-on-resource-deployment' equation down the track?

\* Do you love, *really love*, putting certain resources into play in a certain way? Why do you love it so much? Be aware of your biases and passions - they're likely to be with you awhile, so we can employ that to your advantage (or at least mitigate its disadvantage) as we plan on.

Progress along the path to your Vision while embracing your Values is going to require a clear, rich and diverse resourcing kit, comprised primarily of what you're already in possession of. Moreover, the ways and places you're deploying the resources is getting you results worth considering and building on as you contemplate deployment strategies for tomorrow.

There's a lot to use at your fingertips today. Be really aware of what your resource list looks like and how you're making the most of it.

## Strategic Planning for One - 12. Present review - The mighty support crew

The corollary of successful, self-driven, personally accountable individuals - they never do it alone. In getting yourself to this plane where you contemplate a Visionary, Values-dense future, there were shoulders you stood on and leg-ups you gratefully took. Today, as you ply your craft, there's a veritable sweat shop of individuals and networks helping you do and be your best. Let's look at them....

### The obvious:

\* **Your employer** - the boss, the board, the brand leaders. They're providing you with a colosseum to wield your sword and woo the affections of your chosen crowd. They are bankrolling you to do what you're planning to do today.

\* **Your direct employees** - hired to do your bidding and heavy lifting, their goals align to your goals; their plans feed up to serve your plans. They're a driver of your success today.

\* **Your team mates** - collaborators, contributors and co-champions of the organisational Values & Vision you're working towards. Love them or not, you've chosen a common space and direction, and your will to work collectively will get you further, faster.

\* **Your customers** - the real boss. If they don't pick and pay for what you and your chums are offering up for cash each day, you're off to Centrelink. They REALLY help you.

\* **Your family & friends** - your raison d'etre, the "working to live" motive behind much of your professional grind. A cheer squad, reset-button-pressing bunch whose moral, physical and belief support helps more than we ever acknowledge.

Then there are the **not-so-obvious helpers** you'll employ today;

\* **Competitors** - while most understandably are trying to cut your lunch, they're also working in the service of your industry, progressing visibility and understanding of the importance of what you both do, of how your market segment helps. They bring eyeballs to your profession, selling a concept that you can piggyback on.

\* **Suppliers** - they talk to you and then they talk to other people. They have an opinion of you which, if not technically educated, will attest to the calibre of human being you present and how you behave towards others. They influence your brand and how others see it.

\* **Distant supply chain players** - one, two, three steps down the line from you, but working to serve a common group. The suppliers to your suppliers. The agencies and industry bodies they belong to. The clients of your clients of your clients. Many if not all have a vested interest in you being better, sharper, raising the bar for all to improve their own lives and profitability. So if the opportunity is there, they might just help.

\* **The organic network** - anyone that's every touched you, heard about you, seen your LinkedIn profile or heard third hand about that thing you did for that other person a while back. Because this group is so big & diffuse (it's, err, anyone), think deeply about how you'll inspire their help through a high moral ground approach to every interaction.

\* **The ones that said no** - or that said you'd never make it. Or that you're too expensive, or slow, or "*call me when you've got some more experience*", or complain that you don't do it in yellow, or we're just not ready yet. The provokers of your improvement. The extra effort catalysts you'll employ today because it made you indignant, or reflective on how you can be better, or because it was a turning point in your approach that you'll once more bring to the fore. The worst news deliverers will help you today, if you let them.

So a big army of helpers there for you, working to support you in the quest for your Vision, reminding you why the application of your Values on a daily basis is so damn important. They'll play a role today - think for a moment about how, who's MOST important, and if there are ways you can make more of the help. How you might reciprocate it if you

think that's an investment in your future. Think also about which are likely to play starring roles (and who's an important cameo) as you develop the strategic paths to your Vision for tomorrow.

You've got to be a solo rider. You've also got to appreciate there's a whole posse paving the way and keeping you fuelled and fed.



## Strategic Planning for One - 13. Present review - Trend winds

There are fundamental forces at play in your professional world today - things that don't change with the weather. Death-and-taxes certainties like the importance of pre-call planning & consistent follow-ups. The impact of building & continually investing in relationships with key folk. The power of asking great questions, the consequences of generosity and the universal desire for quality, risk minimisation, value and ease. No matter where you are or when you were there, these things hold true. Maslow's lower-rung stuff - love, warmth, safety, belonging and respect.

Then there are trends. The stuff that seems so important at the time, and yet with the passage of time, proves itself to have a limited half-life. Transient changes to the standard of the day - be it incremental or exponential - that are unlikely to stick around in their present form forever. What's 'trending' today in your professional world?

\* **Technology** - increasingly wedded to our i-devices and in love with e-media platforms as we are, what's particularly hot (or getting hotter) in your domain? Is it a vehicle, a technology platform? Is it a way people are employing it or problems they're applying it to? How is the adoption and adaptation of clever gadgetry and widget wizardry influencing what you and your VIP's spend your time doing or thinking about?

\* **Communication** - dovetails in some respects with technology, but is much broader. How people like to interact with you, where, when, in what fashion? The language, the tone, the structure of our interactions, the acceptable turnaround expectations, the levels of formality and the involvement of collaborators or onlookers. Even the interactivity piece - where is your crew at on the 'tell us / involve us / turn it over to us and we'll find the message ourselves' wave right now? Is yours a place where experts are being asked for the answers, or everyone's self-directionally-learning, or you're crowdsourcing opinions from the ether?

\* **Timelines** - where once it was fashionable to sit down for long lunches, the power coffee meeting usurped and time-poor slurpers slurped more. Now the retreat and sabbatical makes a comeback - there's no replacement for a bit of time to think. Where is your network at in their view of time, be it in hours working per day, availability periods, time out of the trenches working 'on' the business or how long it should take to get a response? Are you email-replying once a day, 3 times a day or within 30 seconds (and is that expected right now?) Are expectations from the payers blowing out, tightening up or fragmenting into a million different standards? How are time trends affecting your efforts today and can you predict the way they're moving?

\* **Balance** - is working 12-hour days the new black, or are we all 4-hour work-weeking in the quest for fresh perspectives and happy home lives? Are technology boundaries being built, breached, or is it a free-for-all on your Blackberries at the restaurant and dining room table? Are spouses coming along to work functions, are Friday-pm frothies with key clients and colleagues the go, or are the lines between perform and play being scratched into the lino? What are the prevailing winds saying about acceptable balances in your business right now, and which way do you see that tracking in the few years ahead?

\* **Practices** - are we telecommuting? Coming together over coffee for an hour on a weekly basis? Holding morning toolbox sessions? Are manufacturing, sales and marketing sitting in the sandbox once a month looking for better ways to integrate? What course did the boss just go on and what's it meaning for your practices? Is what you're focused on today JIT, BPR, TPS or NFI? Are the current standard practices you're expected to be employing likely to shift (hint - take a look at how long you've been doing them, then how long you did their previous incarnation for, and even the practice before that...).

The message here isn't to be dismissive of trends. Just because they're likely to change once more down the way doesn't mean we shouldn't be thinking about them, planning with them in mind and even best-guess predicting where they might go next. Good strategy embeds fundamentals, for sure, but it also understands, employs and rides the waves of prevailing trends (or at very least builds a breezeway to let them pass you by without blowing you over). Consider trendy, and remember it's not forever.



## Strategic Planning for One - 14. Present review - Your customers

Cashola time. Who's paying for your rollicking merriment? Consider your customers (a simple tool to help follows).

**1. Who are they?** Right now, who do you serve that, in turn, pays your salary? In order of importance or contribution, rank them. There will of course be different layers, highly dependent on where you sit in an organisation. Maybe your primary function is serving a cohort of internal customers. Maybe you live on the external selling coalface with a particular subset of clients whose funds contribute the lion's share of your annual sales target. Maybe you're here first and foremost to do the bidding of your boss - perhaps you view them as your #1 customer (after all, they more than anyone could fire you or up your salary, right?) Break it down as you see fit, using a criteria of "which individuals or logically clustered groups have the greatest ability to help me achieve my 2014 professional goals via my dedicated service to them from the position I currently occupy?" Think primary customers, secondary customers, even tertiary and quaternary customers that ultimately benefit from your service efforts, and who, through their decision-making, have the ability to help or hinder your success. Yes, they all play a role. Rank them - they can't all have your equal focus.

**2. What do they most want?** I've deliberately avoided adding the words "...from you?" That presumes they all know. It's certainly a critical starting point - are there things they expect, demand, desire from someone in your role that you've committed to or just won't get you another dance if you don't deliver on? Think then a little more globally - in the job or position they find themselves in this year, is there something you think really drives them to do what they do? Can you identify a clear goal that they're working to achieve, a 'want' they're trying to grasp that might be a bit beyond the scope of what you're doing for them? This isn't about you and your services - it's about customers and what they want. Two very different things, and your role is to look for ever-better ways to overlap those two circles.

**3. What don't they value?** You know the saying "*one man's trash is another's treasure*"? Well, the opposite is true too. Something we possess that we think is shiny and desirable and why-wouldn't-the-world-beat-a-path-to-my-door-for-it stuff? Others don't care for it so much. So consider your customers, with the decisions you've seen them make, the feedback you've heard, the way they roll.... what is it clear that they don't value from you, or others? What services or approaches or mechanisms that someone created to deliver value do they just not see a place or need for in their world? If you don't know, now you've got some homework. Hint - it usually lives at the opposite end of the spectrum to their key wants.

**4. Their #1 stressor in 2014.** What more than anything is keeping these people awake at night, or chewing into the time they'd like to spend more actively pursuing their goals? What's dominating their meeting agendas and underpinning the reasons they keep cancelling meetings with you? What, if it could be magically removed from their plate, would see them walk taller with swag? This thing? This is either the biggest opportunity you have to be the MVP in their team, or the #1 threat to your deeper, more highly-leveraged partnership that needs your planning around. It needs you to think and look long and hard at it. Your client sure is.

**5. The #1 change they're staring at.** They know things aren't standing still. Despite the short-term wants they're aiming to grab and the stressors they're planning to navigate through in the few days, weeks and months ahead, they know there's something bigger around the corner. A shift. A potential game-changer. They mightn't be ready for it, or in love with it, but they know it's coming. You do too, if you look. What's ahead that will unbalance the equation? What's most likely to disrupt the current business plan and create a different dynamic in how they interact with you and others? You don't necessarily need the answer for it yet, but you need to think about it now if you're going to be ahead of, or at very least ready to ride the face of the wave.

As you progress your thinking around paths to your Vision and behaviours that exemplify your Values, these people are likely to play a critical role, whether or not they're the same customers you're serving down the track. They're the foundation you're building on, paying for you to get to the next level. Give them the best of your attentions now, and they'll reward you with lessons and opportunities critical to your future success.

My 2014  
customers...



**My customer groups**

**What they most want**

**What they don't value**

**Their #1 stressor in '14**

**The #1 change they're  
staring at**

(ranked by importance / contribution)

## Strategic Planning for One - 15. Present review - Value proposition

With the thought you put into your customer analysis - who they are (from most to least important), what they want, don't want, are worried by and what major changes they're facing - comes the moment to review your value proposition. Just what it is you are currently delivering that genuinely means something to your customers.

Value propositions are much more than the theoretical features, benefits and even applications that front the service package you're offering to your VIP's. They are the deeper, meaningful, actual upsides that you propose to give someone as a return on their investment, and that they'll deem positive. Today, in what you're spending time on, you're undoubtedly offering a value proposition to your current VIP's (hopefully even delivering on it).

So what is it?

Pick the #1 client you had on the previous list - the biggest potential impactor on your success in 2014.

Now consider what it is you do for them that, above everything else, sees them happy to write the cheques that pay you. It might be a task, or delivering a revenue-generator for them, or some wisdom you overlay on their problems, or a process you drive that gives them some positive outcome that they enjoy.

Now take it one step further. At the end of the sentence you create to address the above, write the words "*which gives them.....*" And finish the sentence. Peace-of-mind? Extra cashflow without any extra effort? Reduced risk? Time savings? Joy, happiness and lamingtons? Just what is it your 'technical support' gives them at a more human, base level? Because THERE's the real value proposition. Something that sits on Maslow's hierarchy. Something they don't necessarily put into words for you but genuinely crave. Think more about the value you offer up to them than they do.

Go through that exercise with your top 4 or 5 client groups you identified yesterday. Take it to the "*which gives them...*" level. If you're not satisfied you've delved deep enough on the first pass, ask the "*which gives them...*" question of yourself again. There might well be several things of value you offer to each client - start with the biggest, most important one. Ask yourself if you do or can do this better than others competing for your VIP's attention. Is it one big thing you do really well, or is it the package deal of a few smaller value propositions that makes you truly valuable?

Now look for patterns. Is there a consistency, or diversity? Is it an inspiring list you signed up to deliver when you first took on the role, or down a side-track you really didn't anticipate? And as you think about some of the changes and sleepless nights you think these clients are facing, are these value propositions you're currently delivering the same ones that'll be valued in your client's changing world?

Avoid delusions of grandeur here - yes, you're valuable. No, not as much as you might hope. You might be able to be though, in the right areas, for the right people, in the right future situations.

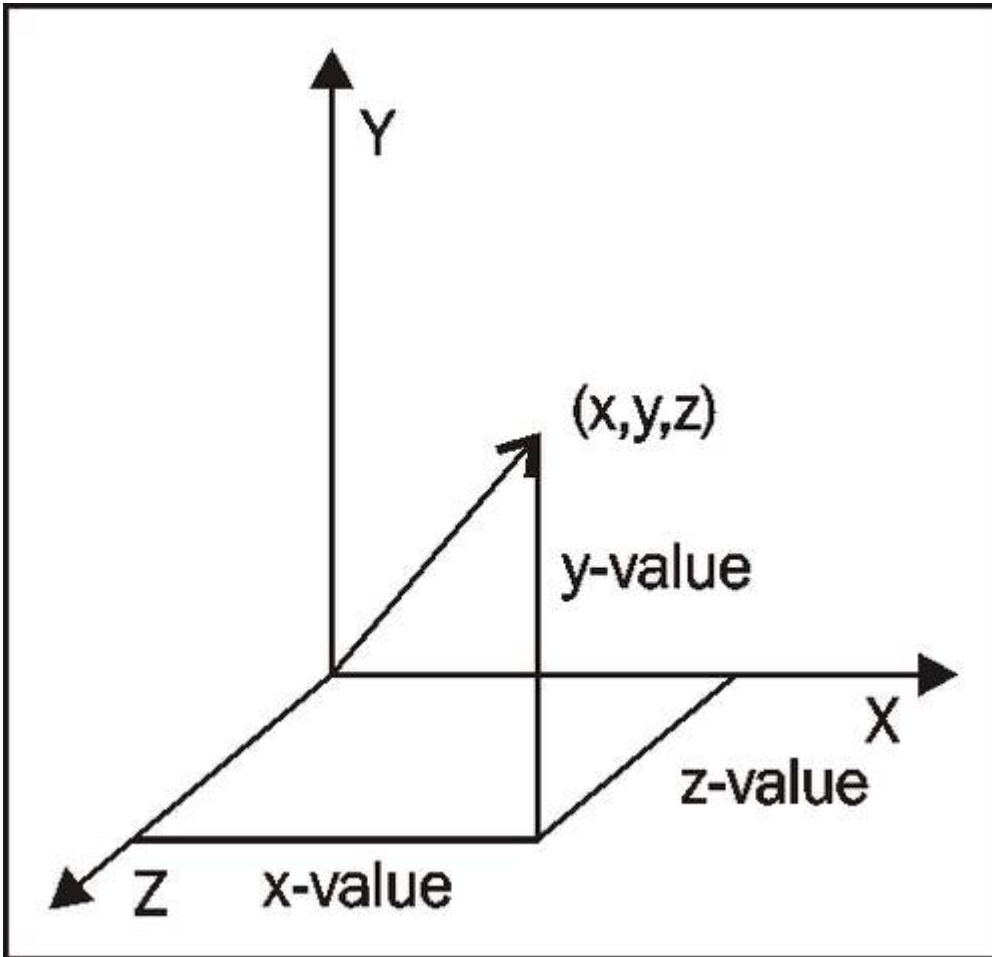
And in a way that's right for your Values and Vision.

## Strategic Planning for One - 16. Present review - Trajectory to the Vision

Fifteen little steps into your strategic planning for one process - here's an opportunity to pull all of the past and present information together for a geometrical mull-over.

Take a piece of paper. Butchers on your wall if you have it, but A4 is fine.

Now - take a shot at drawing the below arrows - a Euclidean Vector - as large as you can. Don't worry about the letters.



If you're having trouble visualising this graph, take a look down at a corner of the room you're sitting in, where two walls meet the floor, all three planes at right angles to each other. Now imagine a line coming straight out of the corner towards you, heading into the air at 45 degrees to all planes. Imagine that this line is heading towards an imaginary ball floating in the middle of the room (draw it). That ball is your Vision (write your Vision inside). And the line heading towards it? That's your trajectory, astronaut - the path you're currently tracking on to hopefully land at your Vision. So let's consider all you've thought through to this point and how it's impacting your trajectory...

**1. The floor** - the foundation you've launched from. The sum total of your experiences, efforts, reputation, interactions and achievements to this point. You can't change it - it's done. The past. Gone - you just need to understand it. Like Earth's impact on a rocket blasting off towards the moon, your foundation has a gravitational pull. It's called 'resistance to change'. The pull of status quo is often strong, and it's very much a function of your life, background, personality-in-action, experiences and the crew you've had in your camp over time. Think about it. Is your launching pad particularly resistant to change and lift? Or is it supportive of sharp trajectories, conducive to you blazing skyward because it's something you're used to? As you consider how high and how far away your Vision is from where you're standing now, you need to be frank about how strong the pull-you-back-to-earth forces from your launching pad are. Because that's what you're going to have to either springboard off or add more thrust to overcome if you're to get your vertical angle right.

**2. The left wall** - let's call this "you-stuff". Your personal strengths, weaknesses, biases, training, tendencies, disciplines and distractableness. The elements within you that you're applying or letting over-ride you that will either hold you on your desired trajectory course or see you spray your shot at the Vision sun and ultimately land you in some random cornfield. Some is hard-wired, some is changeable and able to be planned around & strapped. Think through the elements within what you're developing that will best serve the path you want to take, and what's going to need taming.

**3. The right wall** - let's call this "universe-stuff". Market and situation dynamics happening around you that will play a role you flying straight or flying into the unknown & undesired. This encompasses all the customer considerations, trend winds, market moves and people moving within your orbit. Some opportunities exist, some challenges persist, some unknowns will appear later this afternoon. Think through where the biggest pulls on your current trajectory are and what you'll likely have to do to counterbalance them if you're to maintain a true heading.

On your diagram - on the floor (history), on the left wall (you) and on the right wall (your universe) - write down the biggest push and pull forces you think are currently playing a role on the trajectory you're following (because be clear, you're already moving...). Think about where there's overbalance, where strong course derailleurs exist and what it is that's working hard to hold your nosecone in roughly the right direction.

Now ask yourself the hardest question of all... **are you on the right trajectory to get to the Vision you've defined?** Is it simply a case of following your current line, doing what you're doing, to get you where you've defined? Or is there a correction required, because if you keep going the way you're heading (up, left, right), you're just not going to make it? We can change trajectory, but you need to first understand what it is right now

Two final points - the strength of your Vision acts as an opposing 'gravitational pull'. The clearer and more compelling it is to you, the easier it becomes to stay focused on as you get closer to it.

And in all of this retrospective and current terrain & trajectory analysis, we haven't yet considered the future. Full of new unknown forces, roadblocks, strange black holes and asteroid fields that will obscure the view and potentially dent and smash. To get us through those things, we're going to need every bit of gumption we can muster. That's where we head next, before becoming futurists...

## Strategic Planning for One - 17. Present review - The person behind the wheel

The logical sequence to this point - define your Vision and Values, review your history for lessons & insights, test your Vision, reconfirm your Values, then take an honest look at where you stand right now and the direction you're navigating. Past and present, done. Almost.

There's one final honesty test you need to take before we dive into the future.

It's all about you.

Here are a few questions you have to be ready to confront straight-on if what you'll plan from this point is going to be at all real.

**1. Energy** - how are your current stores? Energiser-bunny-ready, or in need of a Red Bull? Do you have a track record of finding second winds when they're needed to tackle big changes? Are there moments when you say *"I just can't be ar\$ed"* when you know the amount of effort needed to get somewhere great is great?

**2. Gumption** - are you ready right now to tackle a problem whose answer isn't pre-ordained, that requires you to think, anticipate, test, get resourceful and roll up your sleeves? Has initiative and stepping bravely into dark spaces been a driver of your previous successes (or have you waited for someone else to go in with the torch first?)

**3. Will** - is there an iron-spined resolve holding you upright this morning, itching to get you to that Vision at the expense of all the distractions and easy ways out? Do you have a resume full of moments when you put self-discipline and absolute hunger to achieve something challenging into play for your benefit?

**4. Appetite for risk** - how much are you ready to risk today to get you somewhere amazing tomorrow? Are the consequences of you falling short of your Vision and the things you'll have to give up to get there too scary to commit yourself 100%? Do you have a history of putting it all (or a fair portion of it) on the line to get you somewhere you really wanted, or do you traditionally hedge and move more slowly?

**5. Facing change** - when you can see what needs to be done and what needs to be let go of, how ready are you to do it? The friendships, the processes, the comfort blankets of the past - if you see they're not right for what you're aiming at, have you proven to yourself that you can cut ties or go make new ones if that's what's right? Do you traditionally wait for them to arrive, these impending changes, or do you sniff the air and go out and meet them on your own?

There's no strategic plan in the world we can build for you that will work unless you're truly honest with yourself about the questions above. It goes to the heart of you as a human being, how you operate, what you're most likely to do when put under pressure (and a good strategic plan has to test you with some pressure). Don't pee in your own pocket and tell yourself you're at the magnificent end of the spectrum on all those scales. Be candid, think about the capacities and predispositions and muscles and weaknesses you have in these areas, because you're going to have to take them into account as you map out your route options to the Vision.

Know the person driving the bus, and you're half a chance of writing a map that you can and will want to follow.



## Strategic Planning for One - 18. Setting the scene - Vision & Values into Goals

Having taken some open-eyed looks into the past, present and your own fantastic-ness and foibles, now comes the moment to try breaking down that bigger picture Vision into something more workable, more plannable for. SMART goals. Or if you prefer, SMATR goals. Smatterings, smaller pieces that come together to complete the bigger picture. A simple tool to help you follows.

\* Rewrite your Vision (you can't do this enough. Shape it once more if need be).

\* Rewrite your Values (are they real? Are you sure? Are they absolutely iron-clad non-negotiable behaviour filters that you'll lay in front of a train to uphold as you trek to your Vision?)

\* Now - try breaking it down into 2, 3 or 4 SMATR goals that are the best piece-size contributors, embodiments of where you want to be down the way.

**S - Specific** - clear, unambiguous, pointed and focused. You will achieve a certain outcome; you will develop a particular process; you will engage with a defined VIP; You will pour a given amount of time into a set of actions; you will realise a return of a specific amount. No fluff, no generics, no wishful thinking. It should make you gulp. It should produce a mild vaso-vagal response when you think about it - eyes widen, heart rate increase, sprout a cool sweat, hairs on your arms stand up... that's how real and clear and next-step-thought-provoking it should be.

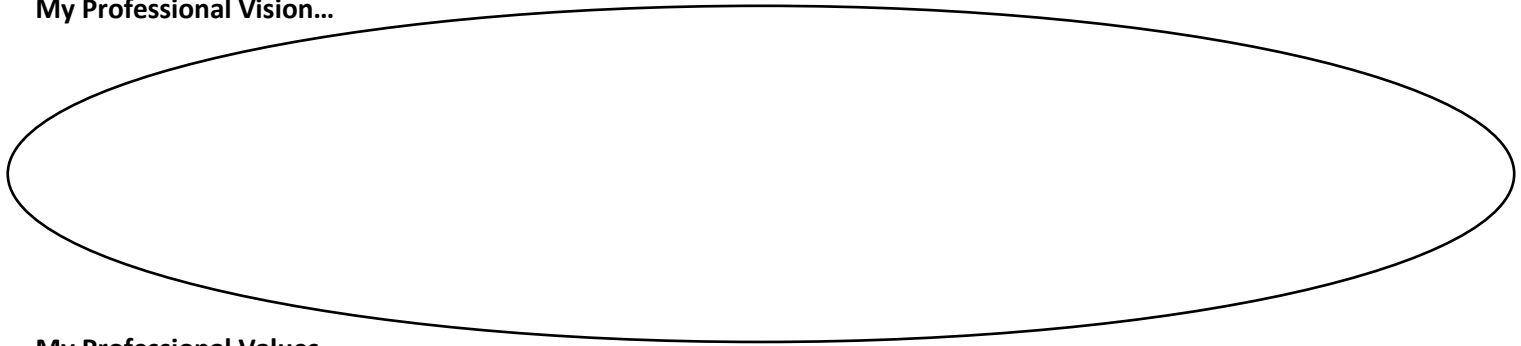
**M - Measurable** - and not with instrumentation or convoluted processes you don't have available to you. I mean by you, easily. At a glance, you can tell - you're 82% of the way there. Or it's a "yes" or "no". Ensuring what you're pouring energy into can be readily measured does a couple of things. It provides transparency and 'nowhere to hide' (we're remarkably good at practicing self-deception when it comes to how we're travelling). It also gives you a positive motivator as you watch the momentum build, the tracker climb. It's a way to watch small progress towards the goals (which in turn is small progress towards the Vision).

**A T - Achievable in the Timeframe you set.** I bundle these together to provoke you to consider the balance between these two linked elements. Maybe anything's achievable if you give it 40 years. Or you want to kick a particular goal, but realistically you know you've only got until Christmas to do it and resourcing won't allow that rate of progress. So put the two together. One - given the timeframe you can allocate, what realistically (challenging, but realistic) can you achieve? And given what you want to achieve, what's the realistic time limit you'll need to work towards to get you there. Great Visions might stretch into the distance; great goals have clear, not-too-far-out time stamps on them (6 months, a year, two).

**R - Relevant.** It's *your* Vision. They're *your* Values. So whatever you set as a goal, make sure it means something to you. Make sure that, in the haste to tick the operational boxes you're spending time on in your job, you're not pouring all your focus onto goals that won't actually get you closer to your Vision. It's a challenging thing, to acid-test your daily actions and the goals written in your corporate documents and see how they align with your Vision. Well, it's your Vision. Make your shorter-term goals relevant to it.

This isn't the end of your goal setting, by any stretch. As we walk through all the different strategy considerations that'll impact your progress in the coming chapters, these goals may well morph, even change outright. Now though, you've got your starting point. A few focus areas, a little more grounded than the Vision, hopefully consistent with the Values you believe in, and bearing in mind your past and present analysis. Keep them to 2, 3 or 4. You can't focus on more than that, really. Make sure they apply the SMATR thinking. And make sure today's to-do list is full of activities in the pursuit of them.

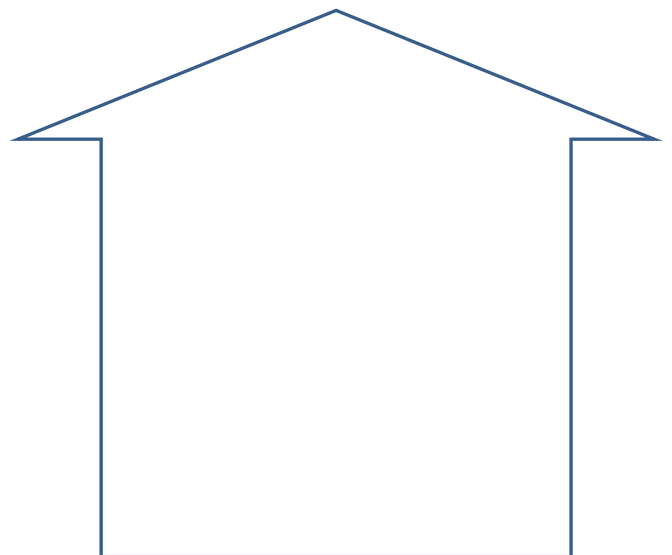
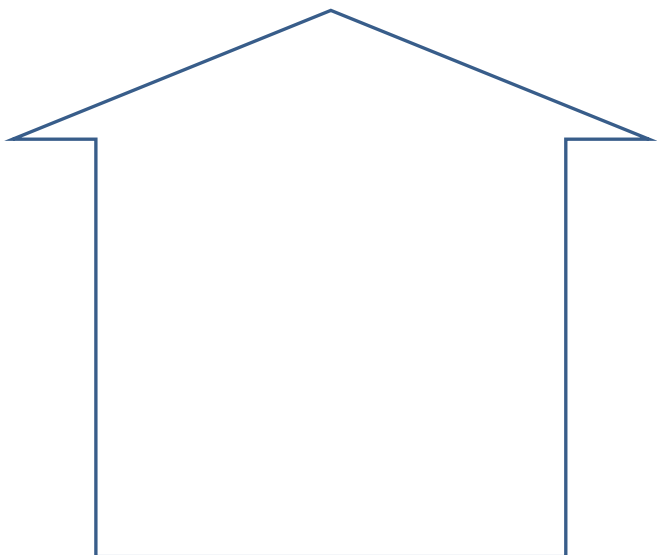
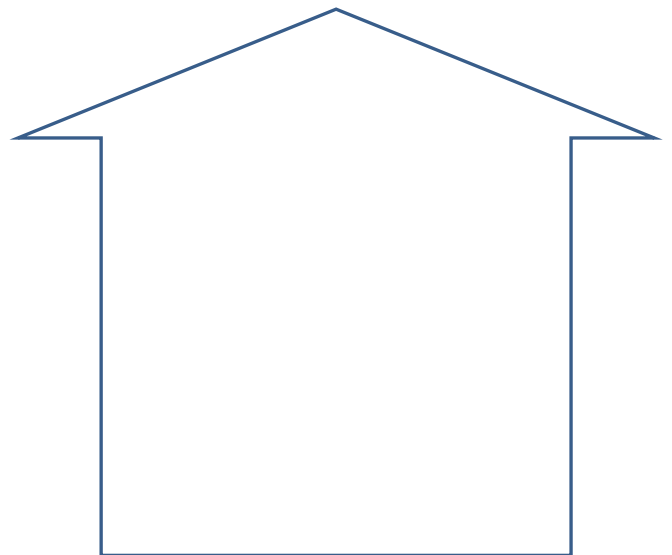
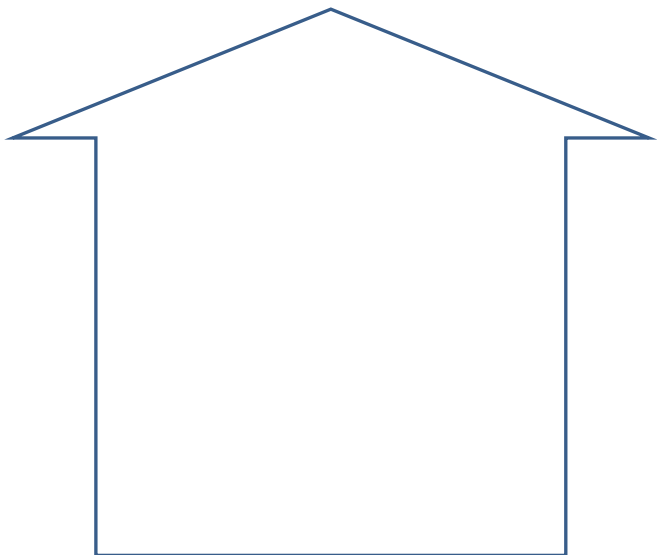
**My Professional Vision...**



**My Professional Values...**



**My aligned short-term SMATR goals...**



Are these goals.... **S**pecific enough? Easily **M**easured? **A**chievable in the **T**imeframe you set? **R**elevant to your Vision?

Do you think these are the *very best things* you can focus on achieving in the short term to get you to your Vision?

## Strategic Planning for One - 19. Future analysis - The opportunity horizon

Into the cradle of the unknown! Tomorrow. What it might hold, what the pink hue in the sky, the aches in your joints and the weatherman are predicting. The groundwork we've grafted through to this point, in defining your desires, mining your history and stocktaking right up until today, has given you a baseline, a 'null hypothesis' that you now get to guess against as we head into the future.

There are those in this readership born with more of a half-empty-glass see-the-barriers worldview, and others with rosier corneas that see first the chances, the goat tracks that just might go somewhere. Both perspectives need consideration - as I'm more of the latter, we'll begin with the upsides. The opportunities horizon.

The natural tendency when considering the gamut of strategic opportunities before you is to scarper to that which you know. Logical evolution of scenarios you're working through at present, repetitions of things that worked in days gone by. So start there;

1. What, standing before you like a gargantuan Queen Mary about to leave dock, is the best opportunity you can see playing out in the coming 3, 5 or more years, that'll get you to your Vision? What do your eyes, your data and the experts tell you?
2. Of all the things you're working through in your vocation at present, which do you believe will persist, evolve and open up to present you with the best opportunities to progress to your desired position?
3. Based on all you know about the history of you, your profession and your track record of riding opportunity horses, which of the stable of firm-rumped opportunity thoroughbreds (or rough outsiders) do you think you're most likely to enjoy success on over the coming half-decade?

That's the logical, based-on-form approach to thinking through strategic opportunities. Then there's the star-gazing, contrarian, abstract thought process in considering an opportunity deck;

4. Think of the three biggest changes you can see the world navigating in the coming few years. Now apply one or more of them to the space you're picking to play in, and consider its impact on the Vision you've defined for yourself. Where's the strongest link, the most obvious connection between what's changing and what you're working towards, and what's the first clear opportunity to fall out of that?
5. Now you've considered that, consider the absolute opposite. What if everyone else banks right towards the shiny one, and you veer left to the roughie? What if the opportunity lays in differentiating yourself from the herd that's also thinking through which opportunities they'll stick their stickers on? What pathway might prove less crowded - less attractive to the masses perhaps, but potentially as firm underfoot given less traffic and still going in the right direction?
6. Shake your supply chain up a moment - what if suppliers became clients, clients became suppliers, competitors became allies and your mate at the next desk became your nemesis. If tectonic plates move and the Rubik's cube puzzle of relationships changes, where does it become apparent you should go next? Which of these relationship shake-ups do you think it most likely to happen, and what then comes out as an opportunity you might see before others?
7. If the big shifts come slower than you guess, if the tidal wave of change is held up awhile, and you find yourself all alone on the beach ready for an opportunity ride that just isn't here yet, what's the opportunity that comes with being alone, being a scout, being ready before others see it? And what if you'd waited up in the surf club, laughing at the early adopters and trailblazers.... what's the opportunity that presents in holding, holding, waiting and watching?

There are any number of strategic positions you can take when considering opportunities, and we'll break them into distinct categories over coming days. I wonder about the opportunity in doing nothing, just moving with tides, taking the passive path to the future. It might be a strategy. If you're OK being flotsam with no control over getting to your Vision. Strategy comes from identifying opportunities and picking one, two, three to pursue with gusto. Consider the biggies, the contrary, the logical and the lateral that will be before you in the coming years, and start forming an opinion on which'll likely get you where you want to go.

## Strategic Planning for One - 20. Future analysis - The challenge walls

As opportunity-rich as the paths to your Vision over the coming few years may be, they won't be without barriers and obstacles to your progress. Challenges, for the SWOT-familiar amongst you, is a broader way of considering both weaknesses and threats. Things most likely to impede your smooth ride and force you to build ladders or battering rams. Or find other paths.

Here's a few future challenge domains you might contemplate;

**1. Persistence (or magnification) of the challenges you're already facing.** You've already taken stock of the roadblocks hampering you right now... what if they don't disappear? What if they get bigger, worse, pricklier into the future? What if the current challenge-surmounting campaign your working through simply won't be sufficient for a gnarlier, uglier version? Go back to that list of 20 challenge categories you worked through a few chapters back, and imagine the difficulty surviving your current treatment plan, even growing in stature and impact.

**2. Your current strength platforms developing rot.** They're holding you aloft today, underpinning your progress to the Vision, something to counterbalance the negative forces threatening your lucrative future. But imagine if these strengths lose their power. You let them atrophy, or they just don't fit the décor of the changing future you're moving into, or your passion for applying them dissipates. Perhaps the biggest challenge of all is no longer having the guns that are getting you through the current battles. Where does that leave you? What alternate firepower sources are you going to have to find, build, develop, recruit, if you're to have a new swag of strengths?

**3. The crowd get it wrong.** Despite the previous chapter's plea to you to contemplate adopting a contrary perspective to the rest of the market, we as herd animals will largely work within the fences of what the market deems appropriate. Then one day the market says it was wrong. *"Sorry, turns out cigarettes ARE bad for you! We now think offering doctors' inducements to prescribe our medicines IS inappropriate. Perhaps trailing commissions to financial advisors DOES lead to poor advice & support after all."* Whatever your most likely market or organisation's version of this error, consider the challenge it will present to you when the crowd stop and shrug their shoulders.

**4. Black Swans.** Academic Nicholas Taleb describes Black Swans as 'unpredicted, outlier events'; things that come as a surprise, that we didn't foresee, but after it's happened, we find a way to rationalise and say *"oh, yes! I could have seen that coming if I'd looked at the data more closely"*. The late Tuesday afternoon blind-siders... challenges you just haven't considered yet. The irony of a Black Swan is that you won't predict it... but you'll try and rationalise that you could have after it's happened. The point - the unexpected will happen, so a. have you let your mind wander to sufficiently imaginative places to contemplate the unlikely-but-disastrous, and b. if something big does happen, have you got yourself some insurance to buy your way back onto another path to the Vision?

**5. A new, more compelling Vision presents itself.** Right now, you're in love with your Vision (you better be, or it's back to square 1 for you right now - really.) You're ready to contemplate any number of journeys to get there, bear any manner of crosses and fight dragons to achieve it. Until a shiner Vision appears. What to do? I can't answer that for you, but you want to consider it as a challenge to your pursuit of your current Vision. Will you be ready to say *"yep, change course, and chalk this up to learning"*? Will you likely say *"I follow through on what I start"*? This all comes back to your Values and forces you once more to test how compelling your Vision is, and think through all the upsides of your disciplined progress towards it even if you opt to abandon it for something more attractive 3 years from now.

You don't need the answers to future challenges right now, however you'll do well to imagine what they might be, how they might impact you, and use it to contemplate the adjustments you're going to have to start making soon to account for them. Let's get more specific in the next section...

## Strategic Planning for One - 21. Future analysis - Technology impact

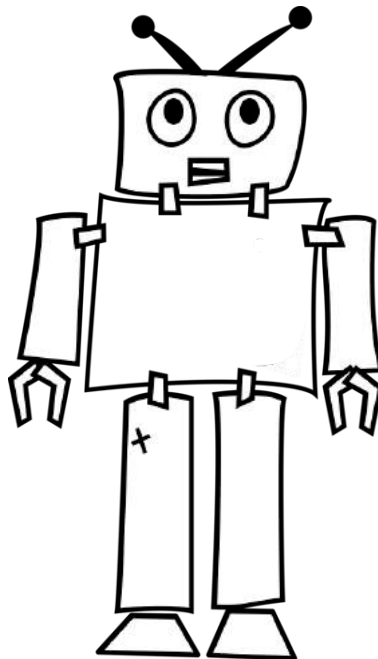
In considering how the evolving future will affect your progress to your Vision and which paths you'll want to develop your strategy for, it's clear that technology will play a major part. Now given that even the Silicon Valley boffins don't know precisely where it'll all get to, what's going to stick and what will fade, it'd be fanciful to think you can state definitively how technology will impact your Strategic Plan over the coming years. There are however patterns and decent guesses you can map around in key areas. Here are ten;

- 1. Automation** - since the industrial revolution, you've seen more and more work tasks outsourced to machines. As technology becomes even more intelligent, what are the tasks currently undertaken by humans in your realm that you can logically anticipate becoming automated? For safety purposes, for efficiencies or economies or accuracy or to free the Homo Sapiens to do other things? Where is current human labour in your professional arena most likely to become endangered or extinct, and what challenges and opportunities does that present for you as you consider your Vision?
- 2. Communication** - technology and its progress is an integral factor in how we communicate, when we communicate, who we communicate with and even why we communicate. What big shifts can you see coming in the years ahead as they relate to you and your map? Consider devices, channels, networks, topics, timeframes, even tone and #language.
- 3. Transaction channels** - we don't spend so much time lining up in a queue at the bank anymore, and retailers are becoming e-tailers as fast as you can say "PayPal". Consider the likely progress and changes in your space around how purchasers conduct their business with suppliers, and what ups, downs and relevant insights that might present to you on your journey.
- 4. Customisation** - want to see what that colour paint will look like on your lounge room wall? Just upload your photo and click "fuchsia". Prefer to receive your online newspapers at 10am with the car guide removed (and not on Tuesdays)? Done. As technology facilitates ever-greater opportunities to customise, where can you see the biggest changes impacting you and your VIP's? On the flipside, in areas where 'mass customisation' or even genericisation seem to be proliferating (think 'automated call responses'), where are the opportunities for you to stand out?
- 5. Speed** - how much faster can we go? Who knows. But yes, faster. The impact on you? Where is it most needed and likely? Where will it most be felt? And what will technology speed support enable you to do more of, less of, even give you more time to slow down and reflect and replan towards the Vision?
- 6. Hardware** - Take a look around your average coffee shop now and see who's doing what with tech hardware. Where do logic and pundits tell you the gadgets are going, and what'll that do for your trek and ability to put your plans into play?
- 7. Interfaces** - You can use the internet on your TV, your fridge, on a screen in your car now... what else is likely to present as a technology-enabled interface as it pertains to the work you'll engage in? What are increasingly intuitive interfaces going to mean for your journey and what you'll need to account for or build talents to make the most of?
- 8. Size** - TV's get bigger, phones get smaller, everyone needs 3 computer monitors on their desk now, the zones of your house impacted by technology grow... what will the real estate occupied by technology you'll be interacting with do for your practices, and are there connected opportunities or challenges you're going to have to map across en route to your Vision?
- 9. Green** - Do we drive the Prius, or not? Is it better for the environment, or not? As remote operating and air travel becomes easier, are the environmental travel costs of FIFO workers likely to drive changes to work and life practices? Do e-readers give you better green creds than printing your papers on papyrus? The relationship between the earth and technology will develop in different ways - where can you see the most logical 'green tech' impacts in your world, and what will you need to think through as a result?

**10. Information banks** - if information is power, then we're all equilibrating our power bases, because it's all there in that little Google box. Will there be clampdowns and different means of holding information so it tightens up again? Is the open source world creating issues or bright lights for your progress to the Vision? What are you going to have to do to capitalise or mitigate?

(And I haven't even mentioned costs...)

Your best predictions will, more than likely, prove wrong in the timing, reach or impact. You can however likely estimate the biggest impactors, the tech-lutions most relevant to your Vision journey in the coming few years. Think hard about what they are, try and define the homework and upskilling and partnerships you're going to have to think about investing in, and be prepared to evolve the strategy as technology disrupts and disrupts and disrupts.



## Strategic Planning for One - 22. Future analysis - Societal norms & deviants

What's going to be acceptable behaviour in future, and what's going to break the rules or flip a bird at the establishment? Moreover, how might that affect the choices you make en-route to your Vision? As you consider strategic options to enable achievement & fulfil you, contemplate the way that society and what it deems as "normal" is going to change in coming years. There's a few dimensions to this analysis;

**1. Society** - which one? You're a member of a few, and maybe different ones in future. Start with your species - as a member of the human race, what are the fundamental expectations your bipedal brethren are likely to have of you as you race down your goals straight? Is that likely to alter in the coming few years? Narrow down a little - your country. Your state or city or suburb or building. Your organisation. Widen up a bit - your marketplace. Your customer groups. Your industry peers. The crew in your cubicle farm. Your family. Your friends. Take a look through the different crews you're a part of, that you're likely to continue to be part of as you travel forward, and think about the key 'societal norms' that exist and their expectations of you and your behaviour. Are there any you see changing based on current directions? Will what's acceptable to them today be acceptable in future? Are there deviations to this norm that you can see giving you an advantage, or that you might be tempted to embrace that could hamper your progress? That's kind of nebulous thinking, so let's narrow it down a bit...

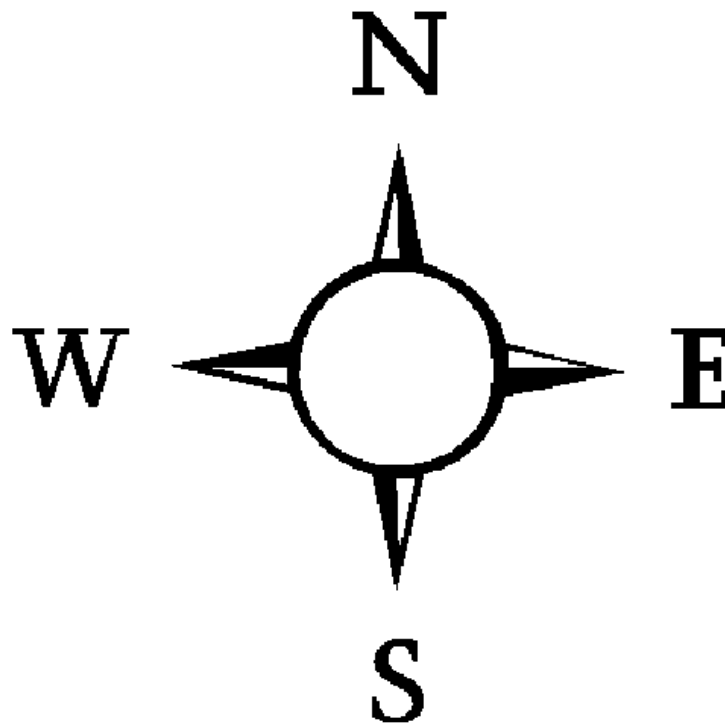
**2. Expectations of your efforts** - think 'customer service' for a moment. What once was expected - a service station attendant that came out, pumped your fuel, checked your oil and washed your window - gave way to the expedience expectation of 'self service'. What will it do in the coming years? Will we expect more, less, different efforts and contributions from those delivering to us? Will we consider enabling the DIY'er with better instructions, videos and free Allen keys "great service effort", or will the expectation be that there are more hands-on approaches to fixing our problems? In the society you're thinking of yourself in, what can you see as being the biggest expectation moves when it comes to the efforts your customers, VIP's or success partners seek from you?

**3. Time, money, peace-of-mind** - think of Maslow's hierarchy (you should, regularly). When it comes to the holy trinity of what-people-want, how do you anticipate society's expectations evolving in the next few years? As it relates to the professional journey you're on - what will the norms on timeframes be like? The returns on investment or the investment levels themselves - what'll be acceptable, and what might well be lower or higher than the masses expect to pay? Risk profiles and the ability to sleep soundly at night - in which direction are your VIP's headed and what do they consider acceptable, normal? What's that likely to look like in a few years, and if that's the case, which strategy avenue seems to make most sense given the Vision you've defined?

**4. The opportunity in deviating from norms** - when they all expect you to wear a tie, consider the strategy of not wearing a tie. When the norm is to provide 24 hour follow-up, maybe there's a case for the strategy of doing it in 12 hours. Or in 5 days (but with some super-thick whipped cream and fresh cherries on top). If the accepted general standard is to partner with an established distribution network, could a winning strategy be to buy your own food truck and deliver your own lemon meringue pies? Granted, deviating from norms can be fraught with risk. It can however almost always guarantee that you'll 'stand out'. It might be that your target enablers would really value a non-normal approach to solving their problems. And no exciting new trails were ever blazed on asphalted roadways.

**4. The case for getting ahead of the norm evolution curve** - this is crystal ball gazing based on pattern development at its best. If you can see through the fog of change and pick where the norms are likely to be in a few years time, why not beat the crowd there? If you know the mortgage broking industry is likely to go "full fee for service versus trailing commissions" in a few years, could your strategy be to go there first? If Skype-type live tech support on video calls is something you just see as being a standard in your industry in 3 years, then go there earlier. Why? A. It's coming, so you'll end up there anyway. B. By the time it's normal, you've had time to refine and improve on the baseline. And C? You look prescient, smart, interested and driving the state-of-the-art. Attractive. Could it help you achieve your Vision?

**5. Beware the deviant falling behind the norm.** If all others in your space will be using sophisticated CRM to better enable & support their team & clients, and you're stuck behind, deviating because you couldn't be bothered or thought CRM was a flash in the pan... how helpful will that be for your Vision attainment? To keep your head above water, let alone take the lead with powerful oar work, you need to be thinking about where the norms will be and what you'll have to keep up with just to be considered in the pack. Make deviance a proactive, differentiating choice, not one that comes about because you got lazy, or took your eye off where expectations were moving. Strategy isn't a passive art. Make choices, and in the important areas, at least keep up with where the norms will be.





## Strategic Planning for One - 23. Future analysis - PD, skills & education matters

What will you need to know more about, be fantastic at or licensed in to successfully stride down the strategic pathways you're considering? It's a certainty that what's in your skill belt right now isn't enough to get you to the Vision you've created for tomorrow. To borrow from Wayne Gretzky, your professional development focus needs to be on "where the puck's going to be", not where it is right now.

\* **Industry-specific skills** - how is your trade evolving, where are techniques and processes and practice advancements being made (and where is the standard likely to get to in coming years)? What are your customers learning more about, what's the state-of-the-art doing and what'll you need to beef up on to be on top of it all in a few more years?

\* **Interpersonal skills** - what kind of sales professional, leader, enabler and supporter of people are you going to have to be, and which domains need more of your time & energy so you stay abreast of what the best will be doing?

\* **Resource marshalling & management skills** - as traditional supply chains splinter into a million pieces, what are you going to need to learn more about & improve your touch with when it comes to garnering the best people, putting together the right infrastructure kit, negotiating for a pot of cash and making the most of the finite daily time resource?

\* **Learning how to learn** - if you're serious about being better, and it'll take some education, then you need to know how to be educated efficiently, effectively, in a way that suits the unique you. It doesn't have to all be textbooks and chalkboard lectures - invest time & effort in knowing not just what to know, but how to know it.

Some of you might find yourselves in spoon-fed professional development seats - companies that deliver great, up-to-date training packages, or industries that demand you go out and get yourself a swag of CPD points each year to keep your licence. Good for you. That, of course, is not enough (and if you not currently gifted these aliquots of education, don't fret - everyone needs to be driving their own PD bus anyway if they're serious about their Vision). Here's a few things to think about as you consider your strategy and the brain-building you need to put in to apply them;

\* **Institutional qualifications** - you'll still need a medical degree to practice surgery in 3 years, so if that's part of your Vision, consider what you'll need to learn (and get the piece of paper for), where you can learn it and when you'll get moving.

\* **Self-directed learning** - from subscribing (and reading) the HBR to joining a business book club to allocating an hour a week to watching TED or Stanford Business School online lectures, to putting together a study group within or beyond your organisations walls, there are no excuses or barriers to schooling yourself. The libraries are free and open all hours.

\* **The two-birds-one-stone of group learning** - it's great to sit alone and listen to podcasts or surf cutting-edge articles on PD topics you're passionate about. It's another thing to sit with a group, listen to opinions contrary to your own, hear about theory applied by different folk in real life (and how that worked out), ask a few questions, be asked a few in return, and as you co-learn, develop relationships and create alliances and jemmy open opportunities. Find or build yourself a tutorial group for the learn + make friends double-shot.

\* **What are your customers learning?** If the VIP's you need to realise your Vision are taking "Technical Drawing for HR Managers" classes, then buddy, enrol. Read what they read, read what they don't read, think about them and go wide in looking for education that might help them.

\* **School of life** - the best education moments usually show up when you're not immersed in looking for them. Broaden your exposure to situations, people, stimulus, forums, locations, literature, pursuits, and let life learn you. Want to turn that into a discipline? Take 5 minutes at the end of every day before you up-stumps and write down the biggest new learn you had that day. Catalogue and be regularly conscious of the best that life taught you each day.

Learning and devoting time to developing yourself to be the person that can achieve the Vision is a broad strategy in itself, and while you'll need to make it a little more specific, be under no illusions. Visions are achieved by those willing to build on what they already have in their bonce. Think about the learning you're likely to need to navigate the changing future. The school never closes.

## Strategic Planning for One - 24. Future analysis - Customer groupings

Let's go to the broadest (but most accurate) description of a customer - anyone that you can help with your professional endeavours that you seek reciprocation from to get closer to your Vision. As you think about the important customer collectives that you're serving today, consider a moment how they're likely to evolve, dissipate and reswarm as different functional units over the next few years.

\* **Paying clients** - right now, if you're in a commercial entity transacting goods and services for cash, you'll be breaking your clients into different groups. The top 10%, key market sectors, by-product-line cohorts or by geographic spread. There are economies, similarities that you trade when you market to, sell to, service these groups. One rep can take care of a set territory; one KAM can manage the big spenders; one product specialist team can own a technical discipline. But what happens when the boundaries move? When technology disrupts a happy hive and all of a sudden the group isn't homogenous in its needs or profiles anymore? When different membership criteria emerge that results in previously dissimilar clients coming together on one page? Could there be changes in business models that will bring together previously unlinked paying groups or individuals that you'll need to plan for in advance? Are the roles of consultants or intermediaries or resellers or aggregators or online transaction communities altering how your paying clients will cluster? In an increasingly niched world, will a traditional cash cow collective fall over and will a new group emerge that presents a great opportunity for you to springboard to your Vision?

\* **Same-team clients you serve** - client #1, your boss, in their current form, may not exist in 3 years. The Board, the leadership team, the frontliners you're charged with arming or the tech crew you're here to serve with your leadership & leveraging efforts... maybe they evolve. Maybe their needs change or their structure or maybe the world renders their present format redundant or maybe the paying clients demand they shift, metamorphose. Given what's happening in your world when it comes to corporate structures, flattening, columnising, co-operatively open-planning... what's the shift you might anticipate when it comes to those up your food chain, what they're after, and what opportunities and challenges does that present to you as you aim at your professional Vision?

\* **Same-team clients that serve you** - think through those paid to do your bidding right now. Suppliers, direct reports, industry representatives... how will their needs, wants, remits and commonalities likely shift in the coming few years? Will market pressures force their structural rethinks? Will you continue to be a VIP they'll see the merit in or be geared to serve and support? If we think of them as clients - people that have the ability to help you or hinder you - what might we anticipate changing their view, their vehicles employed in your service, and what does that do to your strategic thinking?

\* **Alliance partners** - that competitor trying to cut your lunch today? Could they be a critical driver of your Vision-seeking limousine in 3 years' time? Are the shifts in market dynamics giving you increasingly strong reasons to get into bed together rather than fighting for finite dollars? What about those already in your external entourage - is the dynamic of your relationship in need of (or going to be subjected to) a major shakeup? And if the more likely of things come to pass, what strategy choices become apparent for you?

I think this is one of the most interesting and potentially lucrative areas of strategy considerations - thinking through which tight partnerships won't likely survive the change breakers heading to shore, who's likely to buddy up with who on the new landscape (and why), where the new common threads will tie previously distinct entities together and what kind of avenues that opens up for you. Think through the most logical, increasingly apparent directions that client groupings are likely to take, and how you can benefit from or mitigate against the new arrangements to get yourself to the Vision you're so passionate about. Get your head into the new groupings to get ahead.

## Strategic Planning for One - 25. Future analysis - Timelines & the expectations Gant chart

There's a great quote that goes *"the bad news is, time flies. The good news is, you're the pilot."* As we increasingly come to grips with the fact that the only truly finite commodity we have to trade is 24 hours per circadian cycle, we become increasingly judicious about how we invest and employ time to get us where we want to be. And, conversely, we grow more and more frustrated when we feel our mortal coil residency is being wasted.

In considering your strategy options to venture to your Vision, think about what's likely to happen when it comes to timelines and peoples expectations of time utilisation.

\* **Reaction times** - when the trade winds shift, when there's a Eureka moment in your market by a competitor or your best client indicates they'd now prefer all the red widgets to be produced in blue, how quickly are you going to be expected to react? Which direction are expectations heading in, what will technology facilitate and competition demand and where are the asymptotes that you just can't get beyond?

\* **Refreshment times** - V2.0 has been a wonderful tool or product or process for you... but it's time to refresh, to go to V3.0 and 3.1. How quickly will you be expected to refresh your thinking, your offerings, your systems to deliver better, faster, with more chutzpa? What's going to be expected, and if you go better than it, is it sufficiently desirable for the extra oomph you'll have to put into getting there?

\* **Fix-it times** - will they accept their broken beauty sitting in your repair shop for two weeks, or is the new expectation going to be that you'll be onsite (physically or virtually) within 5 minutes and instituting the fix within the half-hour? What'll be the accepted standard for fixes in 3 years, and how does that influence the strategic choices you're going to need to make to realise your Vision?

\* **Down times** - in the 24/7 world, how long can they or you be offline? Are automated 3am responses sufficient, or will a human be expected to deal with (or make) inquiries at any time of day or night? When they're not making money from their spend with you, because it's cooling down, booting up, resting in a paddock or with an oil leak, when do you anticipate they'll pointedly say *"right, I need you to get my money up and working for me again immediately!"* Consider future tolerances to unproductive time.

\* **Delivery times** - as Verruca Salt on *Charlie and the Chocolate Factory* whined, *"I want a pony, Daddy, and I want it NOW!"* How quick will quick delivery be? If Amazon really do employ drone helicopters to deliver books to your door as fast as remote flight technology allows in the coming years, what will your customers' expectations of your deliveries to them do?

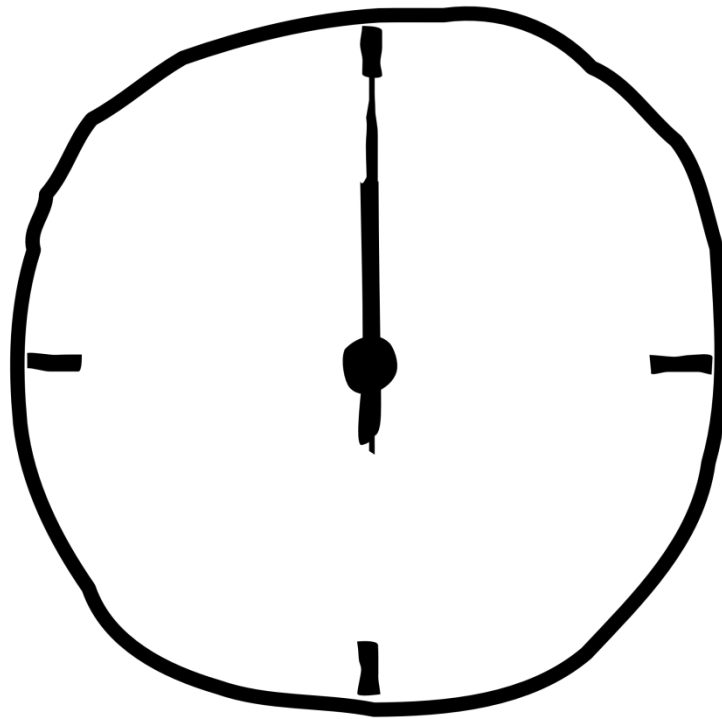
\* **Maturation of investment times** - we live and work longer, but will we expect faster returns on our long-term investments? Whether you're considering investment portfolios, homes, super funds, or the return that a client gets from your product or service, or even the return you get from the investment in your own training... what'll be the expectation of investment maturity in the few years ahead?

\* **Communication of timeline updates** - maybe we forgive slightly-longer-than-ideal deliverable times... IF we're kept in the loop about changes. Regularly. What will 'regularly' look like to you and your VIP's in a few years? How often, in a world where Facebook and Twitter timelines are updated each second, will you be expected to communicate timeline changes to your crew?

Think about a Gant chart (a 'schedule of works' that lines different tasks up in order over a given time period). Think about some of the timeline expectations that your VIP's are going to have of you in the years ahead. From responding to their queries to fixing a problem to showing them V2.0 and then V3.0 to rewarding them for their partnership with you, even to when they might expect to see tangible returns or above-investment-level benefits from what they've trusted you with. Even how frequently you communicate - what do they expect of you today, and how do you anticipate that's going to change in the coming few years? And given that, where are the obvious strategic opportunities for you?

A simple tool to help you work through this idea follows. The timeline numbers - they might be hours, or days, or weeks, or months, or quarters.

Time - you can't bank it, you can't grow more of it, but you do get to choose how you'll invest it. Think about where the expectations will be as they pertain to you carrying out your Vision march, and the strategies these evolving timeline expectations give light to.





## Strategic Planning for One - 26. Future analysis – Acid-testing your Vision, Values & Goals

Over the last double dozen chapters, I've prompted you to take a slow, considerate walk through the foundation elements of a good strategic plan. Set your Vision, understand your Values, review your history, analyse your present situation and then start casting your mind ahead in a few areas likely to experience or influence change. I hope you've stuck at it this far. It's on all of this bedrock that you will make better decisions for you.

We're now just about ready to define your strategies to achieve your Goals & then Vision while staying true to your Values.

Before we do though, this is a timely opportunity to once more test the magnetic pull of the oasis you're aiming for and the gait you think will serve you well on the trip. We've already tested it against the past and the present - now consider your Vision, Values & Goals in the context of likely future forces you've thought through these last few chapters. Use the below pyramid to help you.

... **Want** - has anything changed as you've navigated this guidebook in terms of the Vision you've set yourself, the Goals you've broken it into to give yourself something more concrete to focus on, or the Values you believe in & are committed to living? Do you still want this, *really* badly? If not, think it through again. If so...

... **Insights** - with a little educated crystal ball gazing around the future opportunities, challenges, tech & societal impacts, education & skill requirements, customer groupings & timeline expectations, do your Vision, Goals & Values fit with the future you can see coming? When you line the standouts in each domain up next to each other, are there any patterns, connections, epiphanies that emerge? Any recurrences or ground shakes that'll prove particularly fortuitous or debilitating to the things you want? What, in light of the likely shifts you can anticipate in the coming few years, are the stand-out observations that impact your journey and likelihood of achieving your Vision?

... **Misfits** - where's the biggest fly in the ointment? What part of your analysis just doesn't gel or flies in the face of other things you believe to be true? Is it because your thinking, research or guesswork is wrong? Is it that you need another to put their eyes on it to give you an alternate perspective or wisdom? Is it an unsolvable that you'll need to walk away from and pour your attention onto other areas? Or could this actually be the wormhole through the space-time continuum that represents the shortcut or gold-lined path to your Vision? What's just looking odd next to everything else?

... **Missing keystones** - are there future dune-shifts we haven't yet thought through that will complete the analysis foundation to give you the insights you're looking for before committing to strategies? What domains haven't been covered, or deeply enough, that you anticipate affecting your journey? Is there anything you can think of that, as you ink in your strategic choice in a given area, you would say "*I haven't yet thought through how this will impact my journey or likelihood of success, but I think it might?*" Think now.

The place you're aiming for this very moment? A mental state where you're thinking

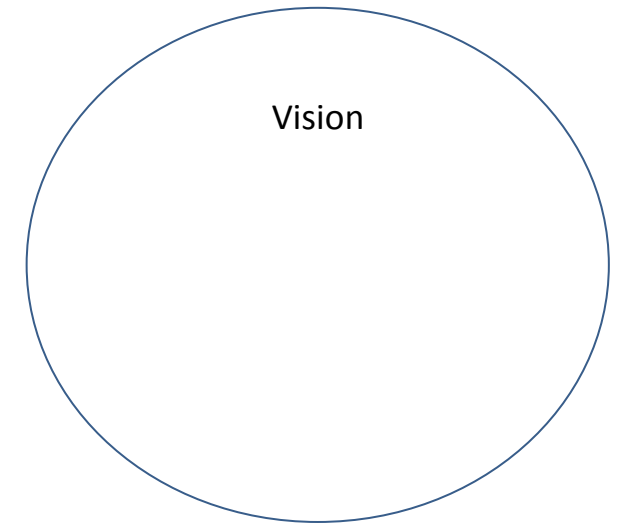
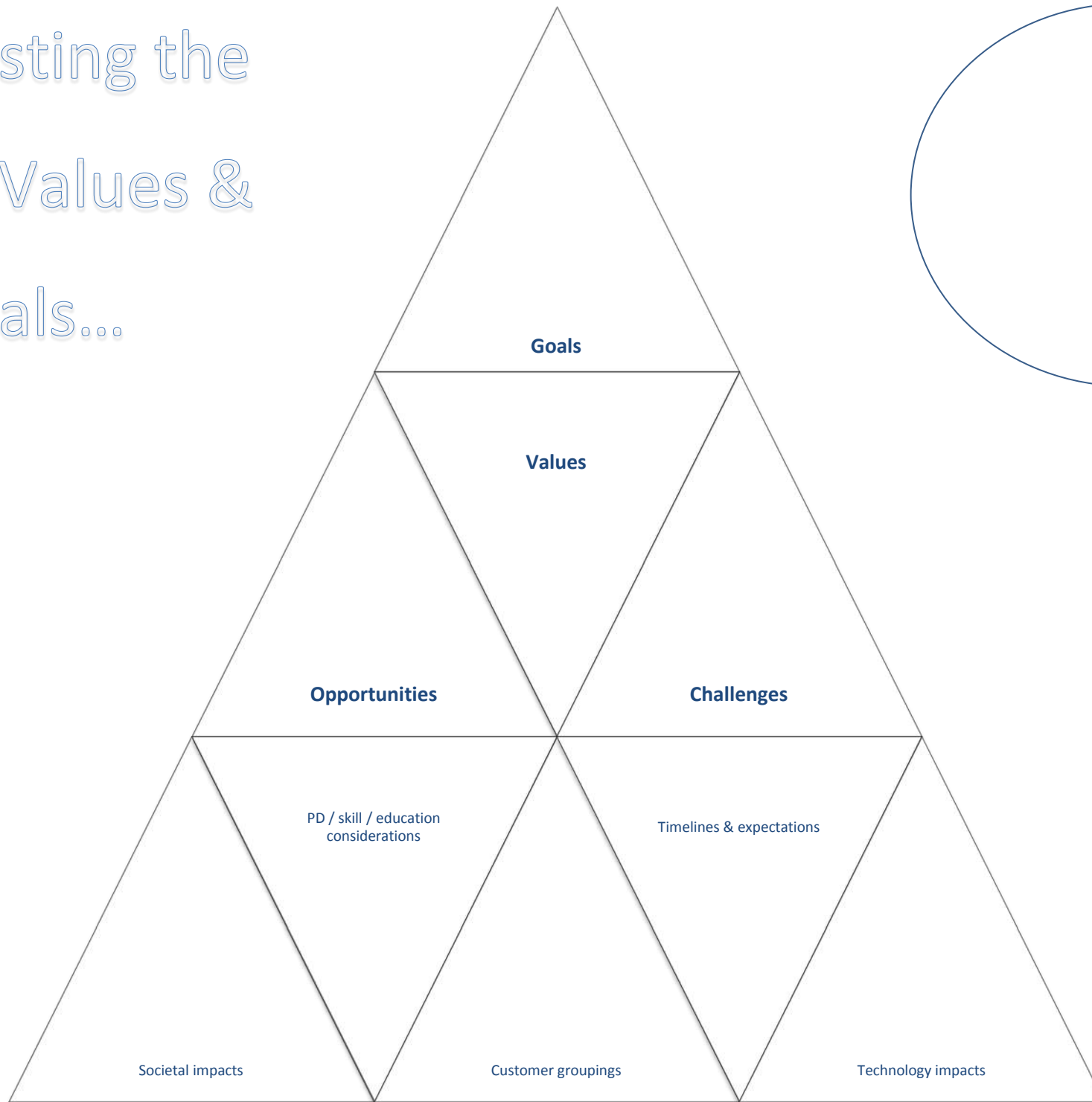
*"I want it. The Vision, it's right. The Goals are the very best things I can see I should set my sights to achieve in the shorter term to help me get closer to the Vision. And the Values are true. Mine. Rock solid and able, no, vital, to be lived on my journey. And as I sift through my thoughts on likely future changes in these progress-influencing areas, I think I've covered the most likely, most impactful changes ahead, and the opportunities, the challenges and the choices I can see I'm going to have to make are starting to emerge from the fog.*

*I think this is going to be amazing...."*

(If this is not you by the end of the day, ask yourself why, and go back and plug the gap.)

The final place then before making some strategy choices is to shirtfront the opportunity costs you're going to pay in picking strategic paths. Because strategy and your disciplined following of it means saying no to side-tracks. You want to think this through in advance...

# Acid-testing the Vision, Values & Goals...



## Strategic Planning for One - 27. Future analysis - Opportunity cost reconciliation

In the chapter following this one, I'm going to serve up to you the first of ten strategic choice opportunities; priorities you'll pick to get you to your Vision. When we've been through the ten strategy categories and you've defined your best opportunities & have selected some paths through them, you'll then get to shortlist, and bammo. You'll have yourself a strategy map to plan your tactics around. And if you have grit and enough want, on these paths, you will make it to your Vision.

Before you get to do that though, there's a few 'fight club' rules you want to be clear about.

**First rule of strategy picking** - if you pick a path, you follow it.

**Second rule of strategy picking** - when you see deviations shooting off the path, heading in a different direction, you can't take them. Period.

**Third rule of strategy picking** - it will be hard to let short-term gratification moments pass you by in favour of sticking to your strategy. Tough cheese. It's your strategy, and you must.

**Fourth rule of strategy picking** - it's your strategy. No-one else's. Because it's your Vision. No-one else's. Which means that the opportunity costs you'll pay to stay on track are yours. No-one else's.

“Opportunity costs” are boardroom-bingo speak for the things you might have otherwise indulged in, but will choose not to in order to stick to your plan with disciplined focus.

Opportunity costs might be people - relationships, time with folk, your efforts in developing partnerships and friendships and supporters. If they don't fit your strategy because they're not serving your progress to your Vision, then you can't let them distract you, and so you say goodbye to them. They become the cost you pay to apply your strategy and achieve your Vision.

Opportunity costs can be practices. Old habits or milk runs you're used to or short-term gratification acts you're renowned for or even running without a plan. Unless "don't plan" is a strategy path you pick (and without wanting to influence your strategies too much, please don't pick that path), you will be required to give your random wanderings the heave-ho.

Opportunity costs can be otherwise lucrative upsides that you might've enjoyed in pursuing different paths; good things.... just not your Vision. If you can take another route and it's fun and there are some little prizes along the way, maybe it's a great path for other people. But if it won't serve your Vision attainment? You said that was fundamentally important to you, right? (One more chance to test your commitment to it right here....). So that otherwise-OK track? Watch it fade to black in your rear view mirror, a track you'll not venture down.

The biggest opportunity cost of all you need to be ready to pay away (and it's the one most people indulge in for too long) is waiting. Sitting on your hands, waiting for the sun to come out or the stock prices to turn or the alignment of more ducks or the flash of inspiration to strike. Strategies need implementing. Visions get attained when you pick and move. So the opportunity cost you'll be required to pay is not remaining stationary.

Many people aren't prepared to pay those costs. The comfort of old relationships that don't serve their Vision, or the habits they've ingrained that are easy but futile, or the (falsely) perceived safety of sitting put and waiting for the wind to change... they're powerful forces. If the viscosity of the mud that is these forces is just too much for you to climb out of, either because your Vision isn't compelling enough or you're not someone wired to achieve a great Vision, then I'm afraid the remainder of this process won't help you. It'll be interesting in theory, but it's just going to be a time-passing exercise.



Opportunity cost payers are ready to walk into an occasionally painful place. They're anticipating pangs of fear and wanting and hunger for the old ways. They need to know upfront that it won't be a walk in the park - amazing Vision attainment never is - but they're clear on what they have to say no to and they've mentally reconciled the fact that the upside will greatly outweigh the temporary hurt.

So, as you prep yourself to start making your strategic choices to get to your Vision, take a good hard look at the things you'll need to no longer partake in, the side-tracks you'll have to let pass you by, and reconcile their death in your mind.

If you can't, then you'll fail.

If you can, then boy oh boy, amazing things are ahead...



## Strategic Planning for One - 28. Strategic choice #1 - Partnerships

Now, you get to choose.

From all the analysis, sifting, thinking, predicting and considering, we've reached the point where you get to say "*right, here are the paths I'll take to get me to the Vision*". The scary bit. The essential bit.

Selecting a strategy is never 100% guaranteed - it's your 'best guess'. If you've done the right level of digging and analysing though, and you understand the Vision you've set, then you stand a pretty good chance of picking a strategic path that fits, that can work, that you'll follow.

Over 10 chapters, we'll break your strategy choice domains into ten categories, then give you a chance to shrink-wrap the handful that make most sense to put the lion's share of your focus towards. As we go through, why not use the placemat that follows to record your Vision, Values and some key words for your strategic focus choices in each of the ten categories we'll work through. Remember, you get to define how far away your Vision is, and that'll influence the strategic paths you'll put priority on.

Let's start with **partnerships**.

\* In the context of all you've reflected on about your history when it comes to partnerships, where your most lucrative current partnership efforts lay, what you anticipate happening in the coming years around partnership opportunities & obstacles, and most vitally, the Vision that you're busting at the seams to achieve, what specifically around partnerships do you think you should focus on?

\* **The strategy noun** - can you hone in on a specific subset of partners that warrant the most focus? That'll be most critical to you getting to the Vision, who'll potentially have the greatest impact on your progress if you can on-board them (or conversely shift your eggs out of their basket if it's a leaky one)? Are they existing partners, or potential partners? Big ones that just need continued focus? Little ones that can become big? Internal or external? Commercial or educational or your support team? Two hundred people or just one? A different grouping than you've applied your efforts to before that need hugging tighter? Who will be your strategic partners of choice, in focus position #1, as you journey to your Vision?

\* **The strategy verb** - what will you do with this group? "Grow" them? "Develop" them? "Consolidate" or "Expand" them? "Reconfigure" the crew, "Research" them, "Understand" them, "Engage" with them, "Incentivise" them or "Educate" them? What's most important to do with these partners if you're to land at the Vision? Again, consider the context of what's worked well for you before, what are you surrounded by at present and what's likely to blow in on the breeze in the coming years? Decide the most important 'doing' word you'll apply to your strategy for this select partnership group.

\* **Strategy core elements** - if for example you've defined "Norwegian Mushroom Growers" as your chosen focus partners and your aim is to "Engage" the key ones to help you succeed in achieving your Vision, what are the top level bits of information that'll guide your ongoing decision making? Is it you're focused on the top 20% by volume sales? Is it Porcini, button and shitake mushroom growers that present the best opportunities? By "engage", do you mean co-develop business plans with the big 5 in North-Western Norway for mutual commercial benefit (or is it about start a working party with the fungus co-operative to identify who your best future partners within their membership will be)? Put just a little more detail into the strategy - not a full blown tactical plan, but hone in on the key elements or measurables of this strategy to give yourself some more direction. And if you can...

\* **Set a strategic goal** - if you believe in your noun (partnership group) and your verb (what you'll do with them) and you've thought through what the top level actions should be, can you set a goal that fits with the timeframe you're working within? I mean, you know when you want to achieve your Vision by... so is there some form of target you can put on this strategic pathway that is realistic, that will be a great interim measure of success, and that categorically aligns with the longer term Vision? If you choose to have "10% of Seahorse farmers in sales partnership agreements @ > 500K per year by July 2016"... will that make a massive dent on your likelihood of achieving your Vision?

Tighten your strategic focus area to a short (3 - 6 word) statement of verb and noun, then consider 2 or 3 short bullet points beneath it explaining what it means and precisely what you're aiming for. Write it down. This becomes the topic of a tactical action plan. More on that later. But guess what?

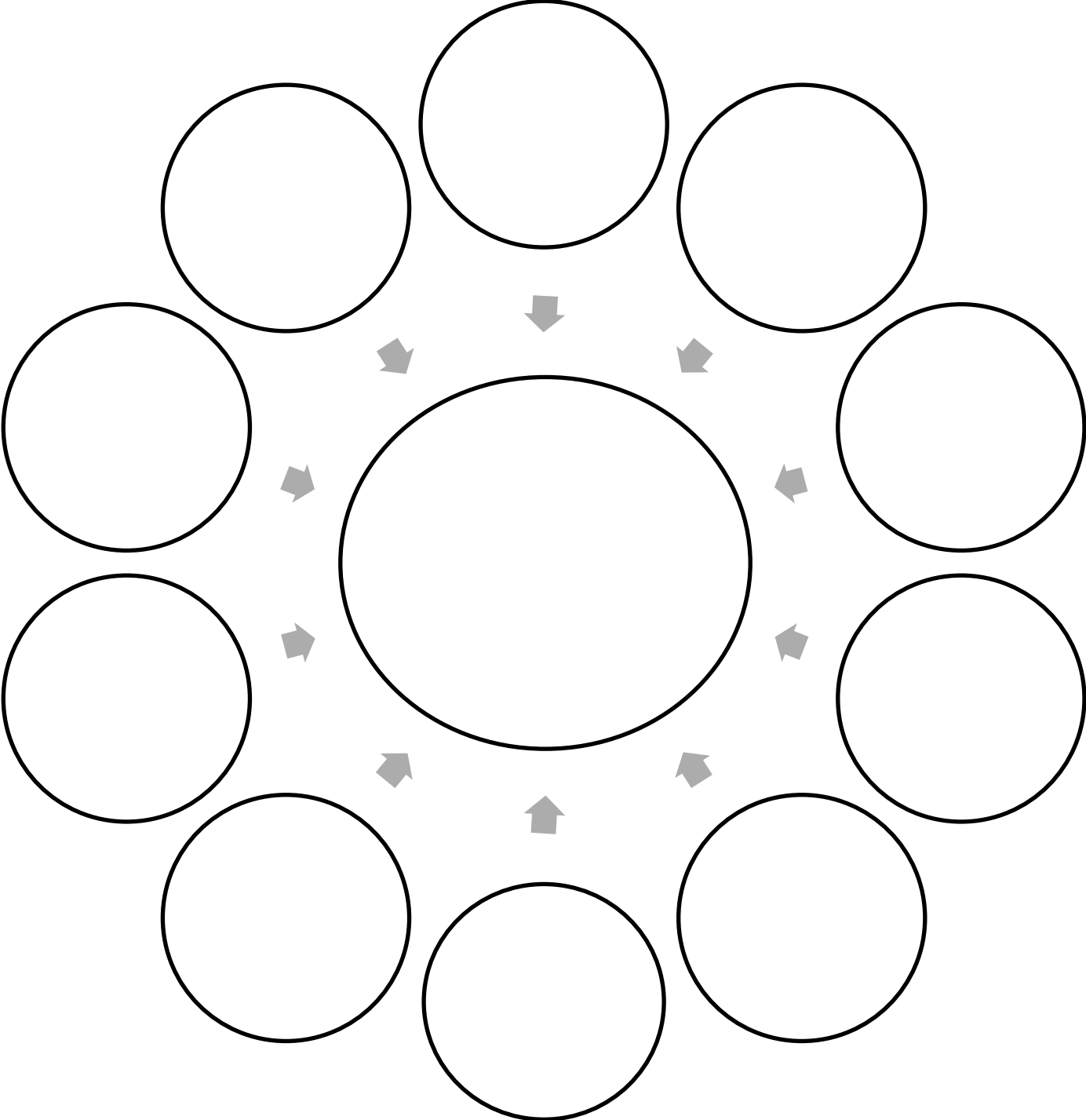
You just picked a strategic path.

You're now a strategic planner. (And a rockstar). Onya!

Let's do it again...



Strategic Priorities



My Values...

## Strategic Planning for One - 29. Strategic choice #2 - Innovation

With your first strategic choice around partnerships now nestling into your psyche, acting as a beacon for some decisions you'll make today, let's consider your position on and activity around innovation as it relates to your path to your Vision.

In considering **innovation**;

\* What, given innovations that have paid off for you in the past, the advancements and improvements to process or products you're working through at present, or the key future directions you see for innovation as it relates to your professional world, do you think you need to focus your primary efforts on when it comes to developing, applying or extracting value from innovation? Where's the biggest, most impactful innovation domain you'd love to (and will benefit from) spending great energy and time working through? Will doing this logically take you closer to your Vision, more than other innovations? (Yes, they're all important in some way, I'm sure. Pick the MOST important, MOST in-love-with, MOST chance of being successful innovation area.)

\* **The strategy noun** - the thing. It might be about a product, or product category, or specific problem requiring an innovation overlay, or a brand of fix. It could be your own professional development, a learning domain, a market segment, a customer type, a technology, a place busting for better technology application, a geographic region, an internal process, a practice. It's entirely up to you - on all you've considered and analysed to this point, what's the thing, the place, the beneficiary or target of your innovation strategy going to be? It really isn't enough to say "My innovation strategy is to be innovative". Give it a target, one you think will pay.

\* **The strategy verb** - depending on where you are in your relationship with this noun and how you're currently putting innovation into play for its benefit, your strategy verb could be around research, or analyse, or audit. It could be review, consolidate, summarise or unveil. It could be start, stop, increase, apply, rework or translate. There's any manner of things you could do with innovation as it applies to your target... what'll give YOU the best bang for your buck? Don't be afraid to be candid and go a little harder if your first cut of an innovation verb is a bit lame in light of what the market, competitors and world is doing. Remember, innovation doesn't have to be some off-the-wall creative idea no-one's ever heard of before. It's just about doing something different and better (that carries value) than anyone's doing it now.

\* **Strategy core elements** - there'll be some subsets of your strategy noun and means by which you can break down your verb to a more granular level. Pull out precisely what the higher-order pieces, action areas and metrics for your innovation strategy will involve. 2 or 3 explanatory bullet points, action areas, that help you and others decipher just what those few highest-order words of your innovation strategy mean. Does it get your heart pumping faster? Do you smile when you look at it? You should. You need to.

\* **Set a strategic goal** - where do you want to get to with this particular path of innovation? If it's to play its role in your Vision attainment, what realistically should you be working to achieve with it, by when? Is this goal something you can build an action plan towards? Is it truly innovative? The rubber-meets-the-road moment - at the expense of so many other things you could be spending time on, what will you put the blinkers on and front up each day to labour and sweat to achieve when it comes to innovation?

Again, tighten your strategic focus area to a short (3 - 6 word) statement of verb and noun, then consider 2 or 3 short bullet points beneath it explaining what it means and precisely what you're aiming for. Write it down.

Two strategies - partnerships and innovation. This is exciting. This has to be real and yours. If you don't think it is, do it again. This is your recipe. And it might look odd to others, but man, you've got a good feeling about it, right?

Let's do it again...

## Strategic Planning for One - 30. Strategic choice #3 - Growth

With your strategy path for partnerships selected and a choice made in where you'll prioritise focus when it comes to innovation, now comes growth.

Offering up growth as a strategy category might be assumptive. I mean, there is something you want to grow in, right?

Cashflow?

Bank balance?

Future profitability?

Market share?

% adherence and compliance measures?

Geographic coverage?

Number of Board appointments?

Skill sets?

Qualifications and business card title descriptors?

Depth or breadth of understanding of a topic?

As a leader?

Friends, collaborators, crew members, network links?

A portfolio of wins, helpees, creative conquests?

The verb's kind of taken care of, so hone in on the noun. What more than anything, as it pertains to your Vision, do you want to 'grow' in / around / towards?

Is it a good growth fit given the past, the present, the likely future and all the doorways and roadblocks you can imagine ahead?

Will it be achievable as a sub-plot to the Vision you've established a timeline for?

Can you quantify it, define it, measure it, hold your nose to it tactically over a period to give yourself a good, regular sense that you're getting there, or tell you if you're not?

Does your capacity to grow require you to atrophy or consolidate or downsize another element of your activities?

Be clear, write down your growth strategy in a couple of words, then underpin it with a few simple bullet points explaining the fundamentals you'll flesh plans out to deal with.

There's your growth strategy at its highest point. Look at it. Is it a good fit? Is it consistent with all we've thought through to this point? How bullet-proof is it? How magnetic is it? How does it stack up against an opposite, a secondary pathway, against not following it?

Love it? Believe in it?

OK then. It's yours. You proud strategy owner, you....

(Let's do it again...)

## Strategic Planning for One - 31. Strategic choice #4 - Markets

Where you'll work and direct your nail gun of talents en route to your Vision is up to you. Your selection of a strategic effort space needs to factor in;

- \* which cohorts of clients, partners or help recipients you're best able to serve real value to (& be served up Vision-progressing currency in return)
- \* where you currently stand, in history, in reputation, in grid position as it relates to that group, and how deftly you honestly think you can cut a swathe through the noise
- \* the limitations of what you can offer in light of the evolving needs and competitor landscape you're trekking through
- \* what you love (because even if you're a little light on talent-wise, passion has a high net-present-value and can bankroll you a ways through the difficulties you'll face)
- \* your Values. If ever Values needed to come to front of mind when it comes to picking strategic positions and priorities, it's when it comes to markets. Some spaces are more conducive to the high moral ground fabric you believe is weaved within you, others suited to the dynamic and aggressive. Be clear and honest about it. The greatest angst builds when there's a mismatch between the places you invest time in, day in, day out, to get to a Vision, and the sort of person you are. So think it through. Can you marry a space rich in opportunity, where your talents and efforts will pay, and that fits who you are as a person?

Pick your market, your strategy noun. A customer group, an employer, a division, a subset, an old collective, a newly-forming swarm.

Then pick your action within it - your strategy verb. Develop, grow, consolidate, build, niche, train, upskill, concentrate, infiltrate, integrate. What do you need to plan to do in that market, with that market, for that market?

Break out the 2 or three key action areas within that overarching strategy - start with a top 10? Engage a few select VIP's? Develop a particular offering for a particularly important subset in this market? Do a research project? Identify the vital few.

Stack this little strategy macaroon next to the partnerships, innovation and growth strategies you've developed these past days. Overlap? Consistency? Diversity? Mixed messages? Are they four key parts you believe integral to your Vision attainment?

No? Massage. Rethink. Adjust. It's your strategy.

Yes?

Alllllllrighty then....

## Strategic Planning for One - 32. Strategic choice #5 - Skill development & application

It'll certainly take quite the grab bag of practices and talents to get you to your Vision. Here though is your chance to put real focus on the skills that'll give you the biggest return on investment. Consider;

\* What do you really need to get better at if you're a walk-up start to hit this Vision? What talents or skills or knowledge must you pour real focus into developing, given what's been, what you're noticing now and what's likely to be ahead? If there's a role-model you see achieving the kind of things you want to achieve, what is it that they're doing really well or applying, and is that right for you? And if it's not, knowing who you are and the forces at play in your professional world, what's the viable alternative skill set you can extend, or better leverage, or plug a critical hole in your game with?

\* Pick your noun and your verb. "Develop financial acumen", "Learn basketweaving", "Expand knowledge of kangaroo species", "Build presentation skills". The detail of the how, when and where will come through in your tactical plan, but get that highest level bit right first. If you can tick this box, this learning, building, developing box, will it have a marked impact on your goal attainment & Vision progression? Is there anything else that'd likely have a bigger impact? Consider the skill development opportunity cost you'll pay by pouring your time into this one (no, you can't do it all, not well...). Are you confident this is the best horse to back and that you can make it pay off?

\* A key to picking your skill development strategy lays in thinking about its application. How will you developing this skill get you closer to your Vision. As you consider how you'll apply it, re-vet the alternatives in your head. Yes, it might be a wonderful in-theory strategy to become the nation's expert on the history of stamp collecting, but if you can't see the mechanisms by which it can be applied as you traverse your professional pathway, is it really better than a second-choice topic that weaves nicely into your day-by-day activities and will actually translate into action? It's always a trade-off - in your quest for the right skill development strategy for you, think through its application.

Then? Same drill. 2 or 3 key sub-points - key topic areas, courses you'll enrol in, key VIP's you might need to involve. Put just the leanest of meat on this skill development strategy heading, and soon enough, we'll take it to the tactical level.

You're now the possessor of 5 strategies to get you to your Vision. We'll do 5 more. You are charting the course and picking your vehicles.

What a way to start the next phase of your professional life.



### Strategic Planning for One - 33. Strategic choice #6 - Leadership

You will not achieve your Vision without prioritising leadership somewhere in your strategy. Simple truth. Be clear about 'leadership' though.

It doesn't necessarily mean you have to be 'first to market'.

It doesn't necessarily mean you have to trailblaze with a new untried initiative.

It doesn't mean you have to spend more or make more or head up the premiership table.

And it doesn't necessarily mean you have to have to stand atop the hill in a kilt, looking down at an army with faces painted blue, loudly spruiking about them never taking your freedom.

(Though, depending on what your Vision is and all you've learnt in the analyses these past weeks, maybe those things do come into your plan...)

No, leadership can be many things, and it can be much less daunting than that.

Leadership means stepping forward.

Taking the initiative.

Setting a direction or course for others to follow you on, support you along, enable your continued progress down.

It means not waiting for the pack.

It means not adhering to the standard or accepting the status quo.

It is about being proactive.

It can be about people.

Or processes.

Or championing ideas.

Or the application of information.

Or adherence to something others as yet aren't.

Or role-modelling.

Or testing.

Or moving the standards bar a whisker.

It means 'going first', 'being first' or 'finishing first'.

So - in the knowledge that there's something you're going to have to lead the way on to get to your Vision, what's the pick of the bunch? Where will 'leadership' play the biggest role in you getting to your Vision via your Goals and embedding your Values?

Pick a leadership platform - one where you see the opportunity, the fit with you and your history and your future, where the challenges to succeed aren't insurmountable and the potential payoff is likely a great contributor to your Vision attainment. Decide what you'll apply focus & effort to, what you'll prioritise as you work through the time and tides of the weeks, months and years ahead. Where you truly can lead. Where you'll want to.

Pick a noun - a topic - and a verb - an action or direction - and underpin it with just a few key points that'll help you love and crystallise this leadership strategy idea.

Got it?

Good. Everyone needs a great leader. Particularly your Vision. Now you've chosen it.

**Now to lead.**



## Strategic Planning for One - 34. Strategic choice #7 - Customers

Life's not fair or equitable. The idea that you'll treat all comers the same, or would want to, isn't realistic. Even within a defined market segment, even amongst strategically selected partners, there are those you'll want or need to fawn over more, seek to please, love to serve and who make your journey more rewarding, either on the trip or at the endpoints. Tighter and more human-focused than the market space you've chosen as your Vision-attaining strategy, consider just what you could be and who you could be it for when it comes to specific customers.

\* Who are "your people"? The personalities, the job titles, the backgrounds or aspirations or the passions they share - who just fits you and the work you're doing and the Vision you're trying to achieve? (NB As a guide, when I set up 42 Mighty Sales Reps, my #1 strategic market was "Professional B2B & health-related sales industries", but my strategic customers were "'mighty' sales professionals, self-driven to grow & achieve". A cohort I connected with, I loved working with, I wanted to serve, and that I knew would help me achieve my Vision). Who gels with your history, your present, your Values, your view of future dune shifts and the increasingly-clearer tracks you can see to your Vision?

\* Pick the strategy noun - hone in on a group. Is it "Mary and Joachim in the finance department"? Is it "The top dozen early adopters of our technology"? Is it "Soccer Mums with 3 kids who drive an SUV"? Maybe it's "3 wise elders that can teach me the ropes". Who gets your intense sub-market focus? Internal or external customers, higher up or lower down the food chain, as few as one or as many as 1000? Pick the peeps you truly want to go deeper with, be closer to in your quest to achieve something meaningful (and that you think are worth that extra focus for the contribution they can make to your Vision).

\* Get yourself a doing word or phrase - "Drive sales 42% higher with" or "Train them as process champions" or "Build service offering Mark 7.3 with" or "Champion their development in ....." or "Expose them to...". Define what you're going to do with or for this very special group, and look at the alignment with your Vision... will it help in a great bang-for-buck kind of way? Or is there another group you think could help in an even bigger way? (So.....)

Flesh it out just a little more - key projects, slightly more granular deliverables, main thrusts of your efforts to help them help you grasp the Vision.

Strategy sits on a higher, longer-term perspective plane than tactics. That doesn't mean you shouldn't hone your strategy in on a small section of the population, even within target markets, who can (and you want to) help you in a bigger way than most.

You now have a strategic focus area for your partnerships, for innovation, for growth, markets, skill development, leadership and customers. This is more than a great many organisations have.

We're going to take you a little further. Because your success means more to you.

## Strategic Planning for One - 35. Strategic choice #8 - Change navigation

The very concept of strategy is underpinned by anticipating change. Otherwise you wouldn't need to develop or refresh it more than once - you could just carry on tactically forever. But you know it doesn't work that way, and so future change gives rise to the need to think through and pick pathways through it.

That said, considering your approach to navigating change as a strategy in itself is, I believe, of great merit. It's one thing to know change is coming and you'll have to choose ways to move through, around or over it. But it's another proposition entirely to pick your posture through the delta, the pace with which you'll anticipate or respond to change, even develop your 'personal creed' when presented with change markers.

Think about how different people view change.

\* **The prescient anticipators** - actively, continually poking their head around the corner to see if they can guess the colour of the car that's coming out of the cloud of dust down the road. They're always trying to predict, to figure out what's likely ahead, to know before others know. Their history of guessing has maybe armed them with a sharper '6th sense' or a nose for the aura that precedes change. They listen to their gammy knee telling them it's going to rain. Steve Jobs.

\* **The "well, it's arrived!" realists** - who aren't necessarily bummed about change, but wait until it manifests and crystallises before making decisions, maybe based on watching the early movers, maybe just because they're more grounded and analytical. Slower to see it, not necessarily slower to start than anticipators ('cause it's one thing to see, and another to move).

\* **The "damned if I'm going to change my approach for some fad" change deniers** - either because they've been burned before or see the opportunities to clean up in the established mine sites while others chase the rainbow of the new, or maybe it's just their personality. They wait, they hold a firmer line and only when they decide it's not a passing whim do they consider a change in position.

\* **The completely ignorers** - but that's not you....

\* **The opposite direction runners** - a quirky, wild beast that either wins big or goes bust, they bank on the opposite being true. When all bank left, they run right. Contrarian in nature or savvy Buffet-style investors, they swim through change waves rather than ride them.

So consider you, your past, your future, your Vision and your predilections when it comes to change navigation, and pick an approach to it as you move on.

Will your change navigation strategy be to actively work to "see it early and move quickly"?

Will it be to "wait 'til the groundswell is undeniable and then systematically work through a response?"

Will it be to "learn the lessons of the first movers and hold out to maximise returns from the old way before changing"?

Will you look for the whites of its eyes?

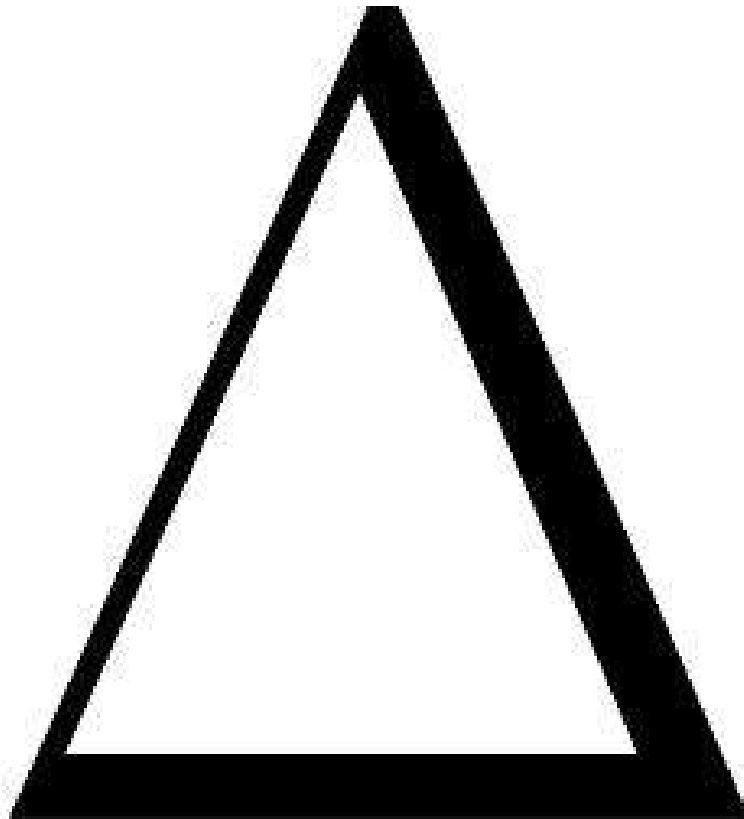
Are there clear change impact pillars or signposts you'll tick off a checklist before naming it as change?

And when your VIP's start barking at you to change or tripping over themselves to catch a different wave, what do you believe will be the right response (Play it cool? Supportively enthusiastic? Analytical & measured? Rabid championing? Turn and head the other way?)

This is so dependent on you, on your space, on your history, on what you predict is coming and how quickly you think it's coming in your world, and of course your Goals, Values and Vision.

Be clear on your change navigation strategy. It gives you, as the author Stephen King calls it, "*hedges against the night*" - a framework to help you avoid the kneejerking or brain freeze that's all too common when change appears.

And it will appear...



## Strategic Planning for One - 36. Strategic choice #9 - Social & community

Gardeners know they can't just focus on the seed planting and focused watering. There's a conditioning of the soil, an enrichment of the surrounds needed to create an environment conducive to growth. More than that, if you take out, you have to put back in. Not just for your next planting. For any future plantings by anyone.

Why would your Vision attainment - the ultimate 'taking out for yourself' - be any different?

Consider 'giving back' or 'putting in for others' as a strategy in itself. Yes, you can aim for it to be a pathway that's directed at your Vision. Think more broadly though than it just being "*a quid- pro quo investment designed for my future harvest*". Here are the upshots of 'giving';

\* **You make friends** - who will be inclined to support or reciprocate however they can

\* **You do good for others** - which nurtures an environment and cadre of successful folk, which has a positive feedback loop

\* **You feel good** - and when you're happy and you know it and you're clapping your hands, you're inclined to push through obstacles and hurdle the barriers that will fall across the strategy paths

\* **You set an example** - and when you realise you're a role model for good, you put a little more positive pressure on yourself to do more, be more, achieve more... like your Vision.

Consider the positive contributions you can make to your society or community (whatever you deem that to be - by business unit, by marketplace, by geographic segment or bigger) and determine a strategic focus point that resonates with you, that's connected to your Values and might be a powerful propeller to your Vision.

\* **The strategy noun** - which community, segment, cause, collective or societal issue is really close to your heart. That you have a history with, are swimming in right now or see as a connected part of your future? That you have the tools, the zeal and the aptitude to contribute to. And, via the multi-pronged array of positives listed above, might just be a great investment in your Vision attainment? Pick it. Focus on it. Put it in isolation at the front of the line.

\* **The strategy verb** - does it need your cash? Your time? Your recruitment efforts or thinking power or your facilitation of connections and solution creation? Decide what it is you should do for this community, this social group, to make an impact that gives you the positive upsides for them and you. Whether it's driving, inventing, funding, supporting, navigating, labouring, poking, barracking for... choose an action path.

Flesh it out a bit - major milestones or sub-goals or projects or key partners that'll need some planning to engage or achieve. 2-3 key sub-points - you know the play by now. What couple of things will be the talismen acts for this strategy, the major benefactors?

Setting a social or community strategy for yourself isn't just a garlic necklace to ward off narcissism and self-interest. It's a multi-benefit means to keep you progressing in a positive direction, fuelling you to persist.

There's a Vision that needs you to, and you can help a whole heap of other folk on your route.

## Strategic Planning for One - 37. Strategic choice #10 - Balance

All work and no play makes Jack a rich industrialist perhaps. Maybe that's not what you want. If you're dead serious about the lifestyle you want to enjoy while you traverse this professional path network to your Vision, then prioritising some balance as a strategy is in order.

Balance needs a couple of things.

**1. Define distinct time or task rules** - where you step away from the operational aspects of your work, where you hand over to others, where you close a door or draw a curtain and say *"this is the point I need to put it down and go pursue something else awhile"*. It can recognise that what you want to achieve professionally will take much time and effort, and so there's nothing wrong with putting extra-mile strategies in there too (e.g. start work at 5am 3 days a week). It does however need to be counterbalanced with some thresholds that you hold yourself too also (e.g.. down tools at 5pm 3-nights a week). For these thresholds to be meaningful, you'll need...

**2. Alternate "balance" focal points** - tasks or people or pursuits or personal life elements you can get into your strategic plan. Nothing directly linked to your Vision (necessarily). But something positive, enriching, revitalising and nourishing to your soul and psyche. Is it running your children's swimming club? Is it Rogaining? Is it a course in furniture making or taking cooking classes or a glass of wine with your significant other or long walks in the hills or competitive checkers or painting or volunteering down at the soup kitchen? The void you create with the down-tools rule only has a hope of being adhered to (and giving you a positive outcome) if you fill it with something you love, something completely distinct from the day-to-day, something you'll look forward to and put into.

Maybe it's more than one thing, and maybe the time rules are different each day. Fine, make that your strategy. The merits of a balance strategy - alternate focal points and time rules you'll play by - aren't just to give you a more fulfilled, rewarding lifestyle (though that's kind of important). The very act of putting down something occupying your every waking thought, going to a completely different space where you're passionate or creative or recalibrating, and then returning later to your Vision-centric work? Well, it makes you better. Your thinking gets clearer. You continually test how much you really want it. The ideas flow. The connections become apparent.

Balance is the final of the 10 strategy areas I'm encouraging you to develop for yourself. It is also perhaps the one that will hold them all together when it gets overwhelming. I've never really understood business or strategic plans that don't meld with the other elements of your life. Why not create the interface between 'at work' and 'out of work' within your strategy? Wouldn't it be more likely to gel then?

Pick your balance noun (focal point(s)), give yourself a couple of simple time rules you'll apply to the divide between operations and extra-curricular pursuits, and tease out just a couple of the key elements or projects within the strategy.

Bingo. Balance. Does it look and feel right?

Ten strategic priorities. Ten categories you've worked through to define what you think will have the greatest impact on your Vision attainment.

Well done.

Now it's time to hone in a bit.

To do that? We need one more piece of the puzzle.

Your Core Purpose.

## Strategic Planning for One - 38. Your Core Purpose

With a Vision now so vivid it should almost bring you to tears of joy every time you look at it, and a strategic priority defined for every finger and thumb you possess, I really hope you're feeling the electricity shoot through your system. The palpable sense that *"I've got myself a real live genuine target, and I've defined the best things I can do to get there.... OMG. This might just be real!"*

Well, it is. It can be. If you let it. You have done the heavier, higher-level lifting. The bulk of what's left is details. Tactics. Distinct action steps. In the service of the strategy. Which is in the service of the Vision.

It's about at this point that you realise *"how on EARTH am I going to develop plans and implement for ten (or more) strategic priority areas! You can't have TEN priorities, can you? There's only one of me, and I'm feeling overwhelmed! Aughh!"*

Well, no. You can't keep your eyes on ten priorities. It is overwhelming. You have to refine. To concentrate. It doesn't mean all ten don't have a place - sure they do. It does mean that some are more important, more front-of-line and more deserving of your focus than the others. So how to pick? You've already developed your 10 strategic priorities according to your Vision.

Perhaps something even higher is needed to help you hone in.

Consider then your **Core Purpose**.

Those of you who've been digesting my daily written platters awhile now might recall a serving from 5 months ago entitled *"Be clear about your Core Purpose"*. It's a concept from leadership author Jim Rohn that there is simply no more important thing for a business to be aware of than its Core Purpose - your reason for being. What you're about. What you're here to do. We break this down into Visions (highest level goals) and Values (rules and beliefs we hold ourselves to as we work to achieve them). A Core Purpose is above all of this. It's what the Vision is representative of and the Values are guides for. So then let's translate it away from an entity to the individual.

What one statement would *you* most like to know will be etched into your headstone?

*"Here lays ..... - a person that ....."* What comes next?

Dedicated their life to....?

Held firm to .....

Championed.....?

Was synonymous with.....?

Did all they could in the service of .....

Pioneered .....

Loved nothing more than .....

Left a legacy of .....

Achieved .....

Think about that. What, if your epitaph could be no more than a 140 character tweet, would headline it? What do you think you're really here to do? What does your view of your life and it's real meaning say to you? Jot it down, cross it out, scribble an alternate... think of it this way - *"this Vision I've defined for myself... what's it really helping me be? If I realise the Vision, what grander purpose in my life am I working to fulfil?"*



(I know this is esoteric and a little brain-hurting for many. Try, just try, pulling your thinking that little higher for a few moments this morning. It's the highest I'll ever take you).

The reason for thinking through your core purpose here is, in its heart-warming light, which 3, 4 or 5 of the strategic priorities you've spent the past fortnight defining make the *most sense*?

What, if you're going to be true to yourself and why you're here, are the strategic priorities you think need more of your attention than the rest? Yes, they can all play a role in helping you to achieve your Vision. But which ones do you think serve or connect most deeply with what you believe your Core Purpose is?

Maybe one heads the list.

Maybe it's a couple of tier 1 strategies and a few tier 2, and then the also-ran's.

There's no simple answer.

The closest thing though to the 'right answer' for you?

Well, it's where really well-considered strategic priorities to serve the attainment of a Vision are ranked in terms of how well they fit with why you think you're on the planet.

Give it a shot. Refine and rank the list. Prioritise the priorities according to your Purpose.

Got it?

Run with it. Rough and rule-of-thumb though it may be, run with it.

Because now we're getting somewhere.

Now you've got yourself a powerful engine and a kick-ar\$e Sat Nav system.

Now you've got a tank full of fuel and the means to go places you want.

And so now?

Now comes the keys and the driving instructions.

## Strategic Planning for One - 39. The next 12 months

Pause just a moment.

Look at what you've done.

You've gone and thought through your professional Purpose.

Defined yourself a personally meaningful professional Vision, stepped down into some SMATR Goals.

Reflected on your personal Values.

Mined your history, scanned your present, imagined the likely future.

Taken a hard look in the mirror at what you bring to the table and where you're short.

Considered what you're going to have to do to succeed and what you'll have to pay to get it.

Then defined and prioritised the strategic pathways you're willing to take to get you there.

I hope you're feeling a little smug. It's *freaking awesome*.

This thing you've done, it's a turbo-charged V8 with fat tyres, a racing stripe and a driver that's one with their machine.

And now it needs the key turned.

All the Purpose, Vision, Values, Goals and Strategy in the world only works with a key turn.

Some activity.

An action plan.

The 'doing'.

A simple planning tool follows - let's start with 12 months.

\* **Write 'em again.** The big high level important stuff. Your compass. Your recalibrators. P. V. V. G.

\* The strategic priorities you picked out of the line-up of ten - write in the most important, impactful favourite sons and daughters. These are the roads to your success. Look at them as the supporting pillars of the high order pieces. Judge once more - best ones? Right for you? Sustainable? Love them - you're going to be spending a lot of time on them.

\* A 12 month key actions map - here's your chance to start getting a little more granular. You won't pick up every action or nuance here, however you can start thinking about seasonal forces and deadlines and likely focal points as they apply to certain times of the year. You can either start at month 1 and begin building from the ground up, or begin at month 12 - where you think you need to be action-wise in a year, and then reverse engineer. Regardless of where you begin, begin. Break the strategy down into things you can do, things you need to take responsibility for making happen.

\* With key activities defined and apportioned across the year, consider the overarching outcome you're aiming for at the end of each month. The markers along the path to tell you you're getting close to the Vision. (Cross reference and update this list at least monthly - it's so very easy to start heading down goat tracks in the scrub when you don't consult your map).

Actions need to be real things you can do. Actual physical movements of your mouth or hands or feet. If your action doesn't involve a motor muscle movement by you, then it's not an action. Rethink.

This is your 12 month higher-order activity plan. Next, we'll take it to the next level - 12 weeks. That's when you really start to feel it bite. Know that the sting is good. It means you're making the tough, vital calls. It's about to get real....



## Strategic Planning for One - 40. The next 12 weeks

Now we pull your focus into a timezone that you can actually get your head around. Where you can smell the days, predict the weather and clearly see the impending conflicts with existing appointments. Tangibly appreciate the potential pitfalls facing the loftiest and noblest of Vision-centric action plans.

*"Well, yes Troy, I do want to roll out this amazing set of activities I've been building to get to my Vision, but two Tuesday's from now, I've got to fly to Dirranbandi for a week, and my boss is away at a Health Spa for 3 weeks and I'm looking after the shop, and this is our peak silly season and my heels haven't touched the lino for a while (or it's our slow season, so I'm flat knacker trying to drum up some rats'n'mice business to pay the bills), and...."*

They will be there. If you haven't seen them all yet, take a closer look.

The reasons to delay.

Things in the next 12 weeks that are inconsistent with your cascade of proactive events to climb the Vision tree.

So? Plan around them. Plan with them in mind. Ask yourself the hard questions about what's not negotiable and what maybe could be dumped, delegated, diverted or downsized. Acid test the things you think you should be doing to get these strategies rolling down the tracks against the things beginning to litter your diary pages or that you know are 'force of habit'.

A tool to help follows.

Pulling a 12 month action plan into the first 12 weeks has a number of benefits. 12 weeks is just long enough for you to start seeing some genuine impact from your actions (and in the process, hopefully acting as a catalyst and inspiration for your continued progress). It's short enough though to be somewhat insulated from the bigger world changes that play merry hell with long term plans. And it's a season. And you can put your nose to the wheel for a season.

So the question is - what do you need to do to make the biggest inroads on your Vision by applying your priority strategies? What physical things must you commit to, carry out and hold your line on over 3 months? Consider;

\* **Start acts** - things not yet begun. What are they, why are you doing them (how are they contributing to the strategy, ergo the Vision), who else needs involving and when will they slot into the diary?

\* **Stop acts** - what's got no positive place in your actions list when it comes to working strategically? What becomes an opportunity cost so that you can fit the positive strategic activities in? What is a historic artef-act, and what can be handed over to others to clean your slate?

\* **Continue acts** - what's in need of galvanising, perpetuating with gusto for its contribution and consistency with your strategic priorities? Has it got appropriate time and resourcing in your plan?

\* **Modified acts** - what's in your diary already that's almost right, but needs a tweak, a coat of paint or needs to be steered in a slightly different direction if it's going to contribute to your Vision progress?

\* **Work-around or -over acts** - they don't play a role in your strategy, but you just can't avoid them. Can they be minimised, quarantined, clumped together for time-written-off efficiencies? What are the islands in the stream you have to navigate your strategic acts around to avoid beaching yourself?

This is the real bit. The actual pull-out-your-diary and make some firm activity calls in distinct time homes. If at any point you thought this read was a theoretical studious exercise, then let me metaphorically slap you about the chops right here.

(SLAP!)

This is real. Don't delay. Don't fritter everything you've done to this point.

Put the actions list together. Put it in the diary. Feel the fear as your pen hits the page or your fingers tap characters in the Outlook diary slots. That's a good thing.

Then relook at the acts.

Have you got 12 weeks' worth of activity in there that'll positively impact your progress? Enough? Too much? In need of a parsley sprig and a pinch of something?

Do it now.

And now?

Now to protect it.

And the best way to do *that* is to start as you intend to finish.

[\*\*Click Here to Begin\*\* ▶](#)



## Strategic Planning for One - 41. The next 5 days

Have you ever met a gunna? You know, "Yeah, I'm gunna do that.... soon. One day."

They're closely related to the shoulda's, the coulda's and the woulda's - just a bit more future focused and less excuse making. As common as broken political promises, gunnas are tricky to pin down on details. You can pick them by the sheepish glazed look they deliver excuses with on being asked "when exactly?"

Do you want to be a gunna?

Here's 5 ways to vaccinate yourself against gunna-ism in the next 5 days.

1. Diarise a **20 minute appointment with yourself** every day for the next 5 days. Use it to translate the thoughts these 40 chapters have whipped up in your bonce into words on paper, slots in diaries and physical acts you commit to doing.
2. **Print every one of the tools you've been given in this guidebook** and progress one of them. More is better, but one is an anti-gunna start. Have the printed versions sit before you, daring you to ignore them, poking the little growth voice inside you to say "*Move, you fool, it's YOUR Vision, YOUR plan, do it!*"
3. **Recruit a hiking mate.** Even though this is *Strategic Planning for One*, having co-cartographers mapping out their own paths to their unique Vision at the same time as you creates opportunities for you to compare notes, compete, encourage, move and not feel so rare.
4. **Write a question** in big black letters on your daily to-do list for the next 5 days, or in your diary, or on your screen (heck, tattoo it on your hand if you like). Here's the question - "*Do I want the Vision enough to do something about it today?*" Reword it in a way that stings you. Then read it every single day. A recurring diary appointment in your e-calendar is a good application of technology here.
5. **Just email me** - show me your progress, that you've begun, tell me you're into it, boots and all or just your tip-toes. It's not for my gratification or even for anything I'll give you back (promise you nothing). It's merely a simple public step off the cliff that starts your journey and makes it real.

No matter the calibre of the inspiration, the comprehensiveness of the toolkit or the time and thinking investment you've paid in getting to this 40th chapter point, there will still be gunnas amongst you reading this right now. It can't be helped. It's an insidious human condition that's very hard, very hard to overcome. Many just cannot.

I hope you can.

The next 5 working days will be almost fully formed for many of you. The scope for moving things around is tighter, and the screams of the set routine is almost deafening you to the little voice saying "*This is your Vision. These are your choices to make. Everything in that diary IS negotiable. YOU get to choose.*" You will want to find a compromise, and then another, and then another until all you leave yourself is the skinniest of windows to maybe try something in your plan, towards your strategy, in the service of your Vision, for your Values and Purpose. So if you are at this worst-case-scenario point, my plea is for you to jam your foot in that sliver of a door crack. Let NOTHING get in the way of you taking even the smallest active step forward in the next 5 days.

Your prize will be progress.

And you will know that you're not a gunna.

And that is one of the greatest feelings of them all.

## Strategic Planning for One - 42. The discipline mandate

In taking this choose-your-own-adventure, you've given yourself the authority (no, make that a self-imposed demand) to act. To not let excuses and comfort cravings derail what is (or most certainly wants to be) a professional life with a higher purpose. You have said to yourself *"Damn it, I've got my career pony to the most sparkling of waterholes, and by jeepers and jingoos and crikey, we're going to drink."*

So to your friend, discipline. That Drill Sergeant, that policy enforcer, that lover of pain that builds strength. You have a mandate to apply it. It will help you. Your strategies can't be implemented and your Vision can't be reached without it.

Where does it need to be brought into play first (and how)?

For some, it's holding firm to the 5 day commitment you just gave yourself. Bit by bit, implementing the first steps on a long and arduous road to a remarkable place of your imagining. Using the diary or the e-calendar alerts to hold your toes to the flames and keep you moving.

For some, it'll be holding your eyes over a course on the biggest pieces - the Purpose, the Vision, the Values, the Strategies. Avoiding the temptation to let them go the way of so many grand horizons, when they become gatherers of dust or something you scoff at as the tactical avalanche once more peppers you with stones tomorrow and the next day, and all you can think is *"Yeah, right...."*. For you, will your discipline friend be the printing of the words, the use of imagery and a branding of your higher order pieces that you can't avoid seeing on a daily basis?

For some, it might be the challenge of continually questioning, asking how the next task that appears compares to your pre-developed Vision vehicles, and whether the ROI for persisting with the proactive is worth the opportunity cost of saying no to the immediately gratifying? To do that, would a discipline partner, a collaborator, a coach or boss or peer that you have a regular set-agenda conversation with be your discipline bellows?

You know yourself. You know where you fall down. If you're remarkably good at self-delusion (and a good many of us are), take a look back at the critical analyses you performed on your character and history. If even that is still rose-tinted, ask someone close to you that has a bent for honesty and candor. They will know, because you're not actually that good at hiding your weaknesses. Be aware and clear of where you're most going to need to bring ol' mate discipline into play. Is it in avoiding shiny object syndrome? Is it in sticking to plans? Is it to apply process to keep aligning your choices with your Vision? Is it to finish that which you began? Is it to start that which you know to be valuable? You know you. Where do you need discipline to help you?

There's a second term commonly used alongside 'strategy'. It is 'governance'. Basically, 'ensuring you do what you said you'd do, and continually assessing whether what you're doing is paying off'. Governance is discipline for strategy. Assessments and measurements and recalibrations and processes and rhythmic reviews and application checklists. As you head down your strategic roadways, you're going to have to self-govern. Find and apply disciplined means to check that you're doing what you said you'd do, and that it's having an impact. Like any discipline, this needs just 3 things;

1. Something for you to check yourself against (the core Purpose, the clear Vision, the aligned Strategies, the inherent Values)
2. A distinct, diarised, regular moment in time to perform this review & renew act, and
3. The will to do it.

You've worked so very hard on number 1. And if you don't have number 3, then there's not much more we can do for you here. It's number 2 that needs you now. You, your diary and the defining of self-governance moments. Time points you schedule to hold yourself to account.



You have a mandate, a self-imposed order to do this. It's the final piece of the Vision-attainment puzzle. Without discipline and governance, you will go awry. You need to book yourself in some governance moments to ask yourself those final key questions...

**"Am I acting in accordance with the strategies I set?**

**If I am, is it paying off (or do I need to tweak something)?**

**And if I'm not, what do I need to do to correct it?"**

Do that, often?

That's the ball game.

And you will win.

## Strategic Planning for One - 43. The Roadhouse

Pull the bus over to the side of the road - just over there, where the "Open 24/7" neon sign is flashing. It's time to stretch your legs. Loo stop. Refuel. Grab a steak sanga, squeegee some bug guts off the windscreen and take a few deep breaths.

Without wanting to overinflate your tyres (because overconfidence invariably goes BANG! when you're ticking along at 110k's), here's a nod and hat tip to the ground you've covered.

If you chose to not be a passenger over these 42 chapters - if you actually did the mighty work - then you've done something not many people on the planet will ever do.

Built yourself a Strategic Plan for One.

Bananas.

Below is the tool to pull it all onto a single page. You won't need much instruction to fill it out. The "*Learnings from the Track*" section, well, that's for you to jot down epiphanies and face slaps as they arise, to feed into your next revision. And to that very point, the bottom right box - that's the bit that'll keep it alive. When you'll redo it. By now, you're really aware of the need to pull your diary into that process to make it real.

Simple. Clear. A Vision-aligned approach to your profession. With a truckload of behind-the-scenes analysis and brain work to give it the reality, the rigour, the fundamentals of you that it needs if it's to work.

Stand here a moment in the carpark of the Roadhouse. Breathe. Take a considered look back at the avenue that brought you here. Remember the clearways, the curvy bits, the potholes and the traffic hot spots. Now come back to your immediate surrounds and think about where you are. Breathe. You're alive. Humming with potential energy. Wanting something more. Damned fortunate possessor of a unique bag of tricks to find it and enjoy it.

Now direct your eyes to the 5-ways just beyond the Roadhouse exit. Roads to somewhere, all of them.

Which one for you? How to choose?

Look at your plan.

That's why you built it.

Purpose. Vision. Values. Strategies. Actions. Disciplines.

Yours. Uniquely, absolutely yours.

Now to use it.

Jump back into the driver's seat (mind your head and buckle up). Breathe.

It's time to go.

Best of luck (let me know how the journey goes).

Troy.



**My Core Purpose**

**My Vision**

**My Values**

**My Key Strategic Priorities**

**Next-level Strategic Priorities**

**12-Week Key Actions**

**12-Month Key Actions**

**Learnings from the track**

**Disciplines and Discipline Support Vehicles**

**Review, Refresh & Governance Commitments**

## Acknowledgments

**Thank you.** If you're still here reading this, then you stuck it out, and you made the sculpting worthwhile. I hope you've enjoyed this thought journey, and that you're turning it into actions.

The thinking behind this *Strategic Planning for One* idea was influenced by a great many interactions across years. The biggest contributors have been the clients that let me come in, first as a professional voyeur, then to experiment and shape and mould in weird & wonderful ways to try and help them achieve clarity around and then attainment of their Visions. In the process, they've taught me, and I hope this repackaging can pay something back.

To ripper clients like Jeffries, Nufarm, AgLink, Peracto, ServeAg, Plansure Solutions, Adelaide Cemeteries Authority, Subnet, Nymble, Scout Digital Marketing, Croplands, CropCare, Wines by Geoff Hardy, Cheese Culture, Coopers Brewery, Nobel Biocare, Medvet, Sarah Constructions, Johnson & Johnson Medical, Hoshizaki Lancer, Dale Wood Business Sales Consultants, Sanofi Aventis, Safetyquip, Maxima, Surgical & Medical, Daimler, DePuy, Henry Schein Halas, Square Holes, Via Media, Weathersafe Shades, The Australian Olympic Committee, KeyInvest, Hamilton Laboratories, the FSU, Nova 91.9, 3M ESPE, Laerdal and a dozen more... thanks for letting me learn as we went.

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And my wife and girls, who inspire me more than anyone. Thanks for letting Dad stick at a very weird day job.

Finally, if this has helped you, then send it on to help another. And if you want just a bit more help to take this simple idea forward, keep your Vision aloft and your fledgling strategic actions alive, then please just sing out.

It's what I do.

To your Visions, and mighty disciplines.

Troy Forrest

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