

**YOU MUST BE COMMITTED TO BEING YOUR OWN HERO**

**PERSONAL STRATEGIC PLANNING**

**PRESENTED**

**BY**

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**AUTHOR OF THE BOOK EMBRACE THE TIGER**

**HOW TO SURVIVE AND THRIVE IN CLIMATES OF UNCERTAINTY**



## THE CASE FOR PERSONAL STRATEGIC PLANNING

Why me?

Strategic planning for me? You've got to be kidding?

Strategic planning - that's for big corporations, isn't it?

What's that got to do with me?

I'm just a small fish in a big pond!

What influence can I have?

Survival is the name of the game for me!

I'll worry about this year this year;

I'll worry about next year next year;

The year after doesn't exist!



Whether you are an independent professional in a one-person operation, a partner or staff member in a professional services firm or a professional operating within a large or small corporation, thoughts such as these may very well cross your mind when the subject of strategic planning for you personally is raised.

Why should you put any effort into it? What is the payoff for you? How can this help you achieve some things that otherwise might have slipped by? My plan in this book is to share with you the benefits of applying the strategic planning process to you personally and to provide you with a methodology whereby you can make it work for you with significant payoff now and in the future.

First of all, let me offer one caveat. Never adopt any planning system. Rather, adapt whatever system is proposed that makes sense for you.

Your knowledge, experience, personal style, temperament, and the circumstances in which you find yourself all will shape the way your personal planning system should be designed. Always keep in mind that plans are a means to an end, never an end in themselves...

If you can keep your focus on where plans are leading you, without getting hung up on the mechanics of the process, you'll find that this approach will open up huge new vistas in terms of both present and future satisfaction in your life.

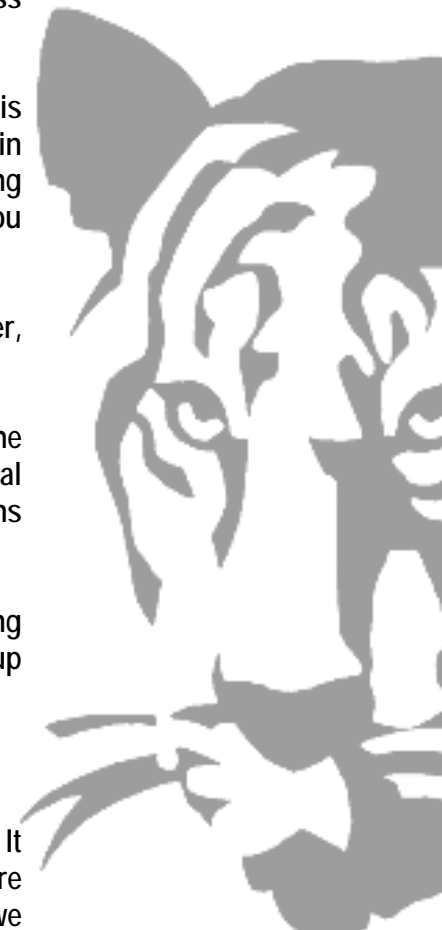
#### What Are Some of the Benefits of Personal Strategic Planning?

First of all, strategic planning helps provide a personal vision for the future. It is so easy to get wrapped up in the present that we lose sight of where the future might be leading us. If we intend to grow in any significant aspect of our lives, we need to periodically focus on what the future will look like.

Depending on where you are in your career and your life, this future vision may be as little as two or three years out or could be as much as twenty or thirty years in the future. The ironic thing about focusing on a period in the future is that what you project for that, time is probably not, what's going to happen.

Specific circumstances, opportunities, threats, and personal preferences may lead you in a distinctly different direction from what you established in your initial planning effort. That does not invalidate the planning process. By focusing on the future, we are able to determine when it is appropriate to change a course of direction.

Career direction is a strong concern for most professionals, particularly during the early stages of their careers. It is interesting to note that only a small fraction of professionals end up in the career for which they initially prepared.



Our interests change, different opportunities present themselves, family obligations impact the direction in which we should be moving. By looking forward, we have a better chance of identifying some of the road blocks that may interfere with where we want to go and identify some of the options that may become available to us.

While this will not necessarily prevent us from stumbling along the way, there is a greater likelihood that we will be able to respond more effectively to things that can significantly impact where we are going.

Creating and taking advantage of opportunities is generally much more productive if we keep our peripheral vision open. These "opportunities" are not limited to our profession. They can include such things as financial investments, real and personal property, family and friends, or anything that has a significant meaning in our lives. While there is always a risk in looking at opportunities, that risk tends to be reduced when we have anticipated it and planned how to deal with it.

As a counterpart to the risk involved in opportunity, strategic planning can also significantly enhance our personal and business security and safety. This includes, of course, financial security, health and well-being, family concerns, and an) factors that might cause significant future trauma.

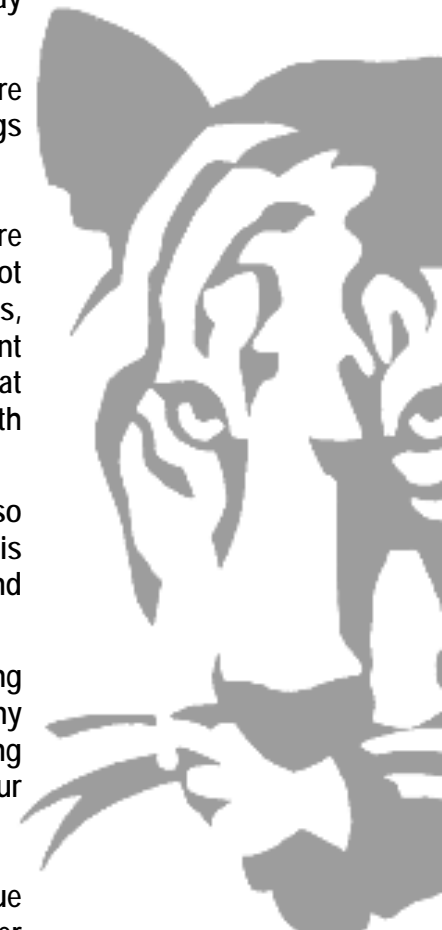
The subject of retirement can arouse a variety of different emotions, depending on where we are in our chronological and professional lives. For many professionals, total retirement may never be a reality. Many of us feel that, as long as we have our physical and mental faculties, we will continue to practice our professions indefinitely.

The base and focus of our efforts may change, but we plan to continue practicing our professions to some degree as long as we are able. On the other hand, there are many professionals who look forward to retirement as an opportunity for a significant change in lifestyle that will create new experiences that their careers may have interfered with in the past.

Regardless of your own perspective on retirement, when you come to the point where it is appropriate for you to back off from what you have been doing, it will be much more satisfying and fulfilling if it comes as a result of planned effort rather than the closing of a door.

The building and maintaining of a balanced life represents another significant benefit of personal strategic planning. Oftentimes, practicing professionals develop "tunnel vision" which keeps them narrowly focused on their business and careers.

During certain periods of our lives, this may be justified. However, life is much more than getting ahead professionally or in business. We need to achieve a balance that includes family and friends, health and wellness, personal fulfillment that may not directly relate to our profession, financial planning, spiritual development, and service to others.



...as a whole, neither will our lives function effectively without some sort of holistic balance. Giving significant attention to another important aspect of our lives does not necessarily detract from our professional focus. In fact, it is possible to achieve a true synergy wherein the "whole" person can be even more productive professionally as well as personally.

A final significant benefit is the opportunity to involve others in making our futures come alive these could include our life partners, parents and siblings, children, professional colleagues, employers, and friends who have either a vested interest in our success or a genuine concern about our future well-being.

Since there are very few things in our lives that we can accomplish without the help of others, it is much more meaningful to get them involved as early, as possible in the planning process. Not only are they able to offer significant contribution, that may help make our plans more effective, their active support in the pursuit of these efforts can go a long way toward assuring their achievement.

### Why Do Professionals Tend to Resist Planning?

Thinking versus action frequently provides an interesting dilemma for many professionals. We tend to be action-oriented. When we are doing something, we have a feeling of being productive. When we take the time to think, we sometimes feel guilty of being unproductive.

While there is, no question but that whatever we do should lead to some sort of productive action, in reality very little such action comes without some kind of realistic thinking. Therefore, it is not "either-or," rather, it is "both-and." In fact, without investing the time and effort required to think about where we are going, there is a very strong likelihood that we will never get there. And, of course, we have to decide where "there" is.

It is difficult to do that without putting significant effort into thinking.

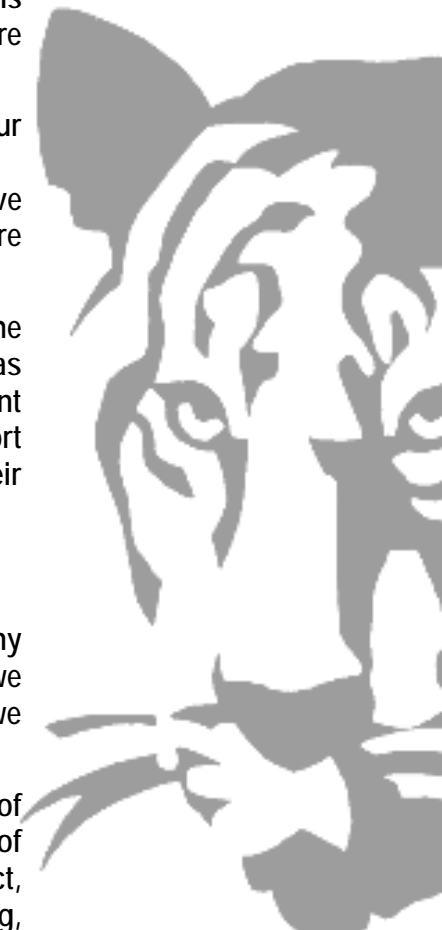
### Time required frequently is a barrier to effective planning.

How often have we said?

"I just haven't got the time to do that right now". While that may be a legitimate reaction occasionally, in many cases, it turns out to be just an excuse. It's interesting to note that we frequently, don't have time to plan the job appropriately ahead of time.

However, when the job does not get done right, somehow or other we always find the time to do it over again. Time is one of those exhaustible commodities with which we have to deal as professionals. Consequently, the planning process, while it does take time, could lead us to much more productive use of what limited time we do have available.

Changing circumstances frequently is given as a reason for not putting significant effort into planning. "How can we plan when things are changing so fast!" is a frequently heard expression.



As we identified earlier, changing or modifying plans is not only inevitable but actually desirable in many situations. The key, of course, is to recognize when changes are taking place.

There is nothing wrong with changing direction, provided we know we are changing and there is a valid reason for doing so. The purpose of a plan is to provide us with a foundation from which we can make appropriate digressions, which may be more productive at the time.

When things are going well is a time when it is easy to fall into the trap of thinking that they are going to continue to go well "forever". When we are on a highly successful path is probably the time when strategic planning is most critical. Despite the euphoria we may feel at such times, it is absolutely certain that it will not go on "forever".

Something will happen that will be other than what we had anticipated, thus moving us, whether we like it or not, in a different direction. Being better prepared for dealing with those situations that may run counter to our desired direction is one of the single most important reasons for doing strategic planning in the first place.

While we may not be able to anticipate everything that will have an impact on where we are going, we stand a much better chance of dealing effectively with that if we have looked ahead and anticipated some of the things we might be facing.

When things are not going well is probably a more legitimate reason for postponing strategic planning efforts. When your house is on fire is not the time to think about installing a sprinkler system. Really, when we are faced with survival that has to take precedence over where we are going in the long run.

For, as one wag said, "In the long run we are all dead." The problem that frequently faces us, however, is that we tend to think we are always in a crisis situation. Unfortunately, this frequently comes as a result of the way we function personally. If you find yourself in a situation, where you are moving from one crisis to another on a continuing basis, perhaps that is when you need to take some time off, sit back and really think about where it is that you want to go.

We frequently find that these crises come as a result of a lack of effective planning in the first place. At some point, we may need to break that pattern in a way that is going to be more productive for us.

Finally, not recognizing the difference between strategic or long-term planning and operational planning may inhibit our effort. Operational planning, which is commonly what we have to apply in dealing with crisis situations or in achieving our short term results, tends to be quite specific and very much action oriented.



Strategic planning, on the other hand, is much more conceptual and visionary it is far more directional than specific. If you plan to commit yourself to some form of strategic planning in your own professional life, it needs to be addressed at a time when that is the principle focus.

You may find it helpful to have someone else assist you in the process who can keep you focused on the strategic or long-term concerns- Think of strategic planning as helping you determine where it is you are going and operational planning is how you will get there.

### In Summary

Strategic planning has at least as much value for the individual professional as it does for an organization. It helps establish a personal vision for the future that encompasses both career direction and a balanced personal life. It is an exciting way of creating that future rather than allowing it to just happen,

### YOUR PERSONAL MISSION STATEMENT: A FOUNDATION FOR YOUR FUTURE

A statement of mission is probably the single most important strategic document you can have whether you are functioning as a Fortune 500 corporation, a small to medium size business, or as an individual professional.

It establishes a firm foundation providing clear guidance for all significant decisions. A mission statement describes the nature and concept of the business as well as the life in which you expect to be involved.

It also clarifies the conditions under which decision will be made regarding who you will be serving products or services you will be providing, mid the fundamental philosophy and personal values under which you expect to operate.

In addition, it serves as a device for effectively communicating with other people who can contribute to, or are impacted by, what you intend to do as well as avoiding future misunderstandings.

For example, if one of your personal convictions is that you will not, knowingly, perform any actions that will have a negative effect on the environment, stating that puts you on record for Your own guidance as well as others.

To create a professional image, The fact that you have developed a statement of personal mission, which is thoughtfully prepared and which you are, in fact, following communicates very clearly to others who may be in a position to support you that you are really serious about your profession and are prepared to back up whatever you are committing yourself to do.

This can be used with potential clients, associates, vendors, employers, bankers or venture capitalists, and professional colleagues.



## Benefits of a Personal Mission Statement

A mission statement is not a static document. It is a dynamic, living thing that can provide all sorts of direct and tangential benefits. Let us examine some of these. To articulate the specific kind of business in which you should be involved, including your role within that business, thus providing a clear focus on where your energies should be directed.

For example, suppose you are currently an engineer in a high tech company with ambitions to move into management. If you continue your focus within your engineering discipline, your managerial future is limited.

If, however, you were to identify your future business role as "managing and integrating a multidisciplinary operation," this might open up significant opportunities for expanding your horizons.

If you are a computer programmer/analyst, either inside or outside of a major organization, who identifies your business as systems design mid support, you could provide services as widely varied as hardware and software acquisition, installation and integration, management information systems design or modification, systems education, time sharing services, or actual management, as a vendor, of systems operations for one or more separate businesses.

To help you determine what not to do to keep you from investing time, energy and other resources in activities that are inconsistent with where you want to go. For example: I determined early in my career as a consultant that I was going to concentrate in my business in providing only products and services that had been developed partially or entirely by me.

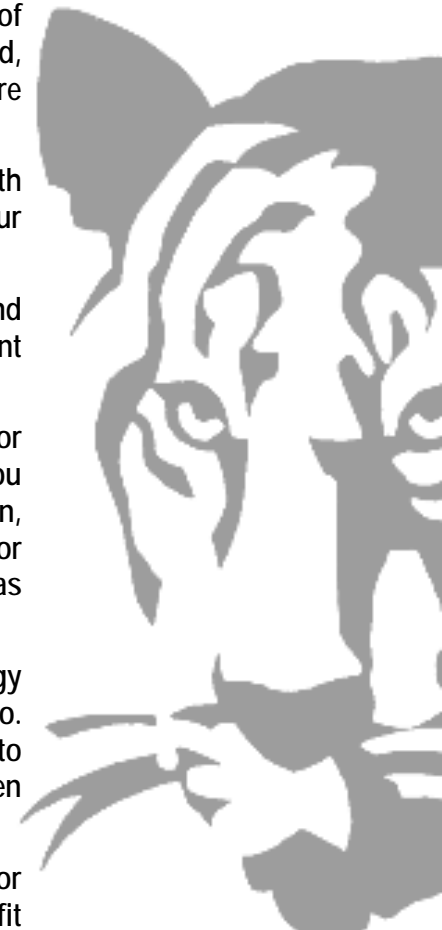
Over the years, I have had many opportunities to take on additional products or services, developed by others, some of which provided very attractive profit potential. Had I pursued those opportunities, however, it would have diverted me from my own strategic plan, which was to position me as one of the top experts in my field.

To communicate your own philosophy and values to those with whom you must relate. By taking a clear position on such things as ethical or environmental issues, quality of service, relationship with clients, commitment to your family, and the role you intend to play in contributing to your profession can go a long way towards focusing your efforts

## How To Develop Your Personal Mission Statement

The first step is to seclude yourself where you can spend an hour or two completely uninterrupted and write down your answers to questions such as those shown on the next page.

You may wish to add to, delete or modify these questions based on your own personal preferences and the circumstances in which you find yourself. These questions should also be answered independently by anyone else who has a strong personal interest in how you pursue your profession.



These could include your spouse and/or other family members, business/professional associates, and close personal friends or advisors. We recommend that this be done independently at first to reduce the potential of being unduly influenced by the answers of others.

Next, we recommend that you arrange with someone who does not have a strong vested interest in its outcome to Help You facilitate the determination of your mission statement.

This could be a professional colleague with whom you might have a reciprocal arrangement. In other words, that person helps you develop your statement of mission and you, in turn, help them.

This is valuable even if you are doing it strictly by yourself without other people being involved. The role of facilitator is to force you to defend what you have stated and to ensure that you have examined the issue from all relevant angles.

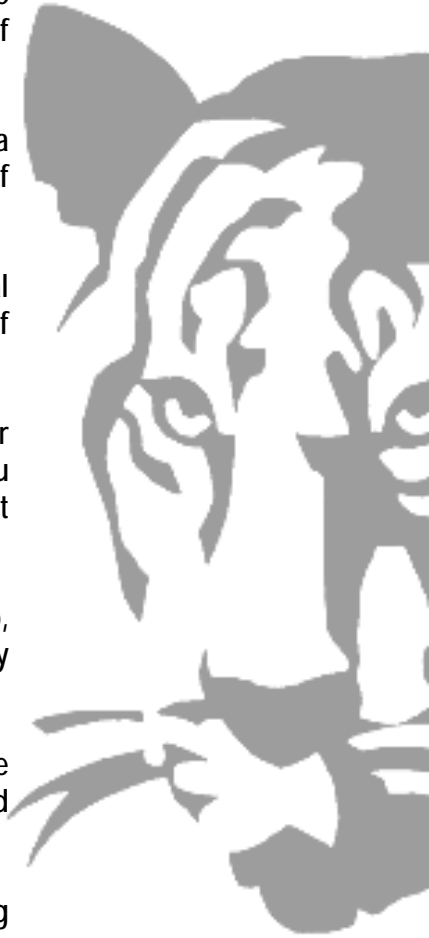
This may include playing the role of "devil's advocate" on occasion. Also, someone without a personal vested interest may be able to help you identify certain factors, which your own myopia keeps you from seeing.

When others are involved in helping you develop your statement of mission, the facilitator's job will be to draw out divergent points of view with the hope and expectation that a true synergy will occur.

In other words, the statement you eventually come out with should end up being stronger and more meaningful than one you would have developed solely on your own.

If you are involved in an organization, whether that be a diverse business or with a group of principals in a professional firm, the development of a statement of organizational mission can prove to be one of the most powerful teambuilding tools available.

It forces those who are deeply involved in the business to address some of the broader issues that frequently get overlooked during day-to-day activities. This is especially true of discussions around philosophy and values.



## Clarifying a Professional's Mission

1. What business and/or profession am I in personally?
2. What business and/or profession would I like to be in?
3. What do I really enjoy?
4. What business and/or profession should I be in?
5. What is my basic purpose in business and in life?
6. What are or should be my principal business functions and roles, present and future?
7. What is unique or distinctive, about what I can bring to my business/profession?
8. Who are or should be my principal customers, clients, or users?
9. What are the principal market segments, present and future, in which I am most effective?
10. What is different about my personal business position from what it was three to five years ago?
11. What is likely to be different about my personal business position three to five years in the future?
12. What are my principal economic concerns?
13. What are or should be my principal sources of income?
14. What philosophical issues, personal values and priorities are important to my professional future?
15. What special considerations do I have in regard to the following (as applicable)?

### SPECIAL CONSIDERATION

- ▶ Board of directors or other outside group
- ▶ Employer(s)
- ▶ Partners or associates
- ▶ Staff Customers, clients, or users
- ▶ Vendors or suppliers
- ▶ Professional colleagues
- ▶ Professional associations
- ▶ Family
- ▶ Church or community
- ▶ Myself
- ▶ Other (specify)

The statement of mission you ultimately produce will not necessarily contain all of the answers to the questions you may have identified. Some of these may be more appropriately addressed in other parts of your strategic plan while others may not be important enough to be included at all.

Perhaps more than any other step in the entire planning process, the process of developing a statement of mission is far more important than the product.

In other words, the thinking, discussion, evaluation, modification and reflection that take place during this development effort represents the primary value that comes from your statement of mission. The actual statement is merely a codification of the effort that you go through.



## Making Your Mission Statement a Living Document

Once the initial draft of your mission statement has been developed, you may find it useful to circulate copies among some of your professional colleagues or others who can provide you with some meaningful feedback.

Naturally, this also includes those with a strong vested interest in its outcome. Letting it simmer for several days before putting it into its final form sometimes can help identify other factors that ought to be included as well as certain modifications that might strengthen the document itself.

You probably will not be completely satisfied with your initial draft or even with the modified one; you may develop following that draft. However, we strongly recommend that you adopt your mission statement as representing your current perspective with the understanding that it can be reviewed and modified at a later date.

You are far better off having an imperfect document that can at least get you started with the rest of your strategic planning effort than waiting until you have one that meets all of your personal expectations.

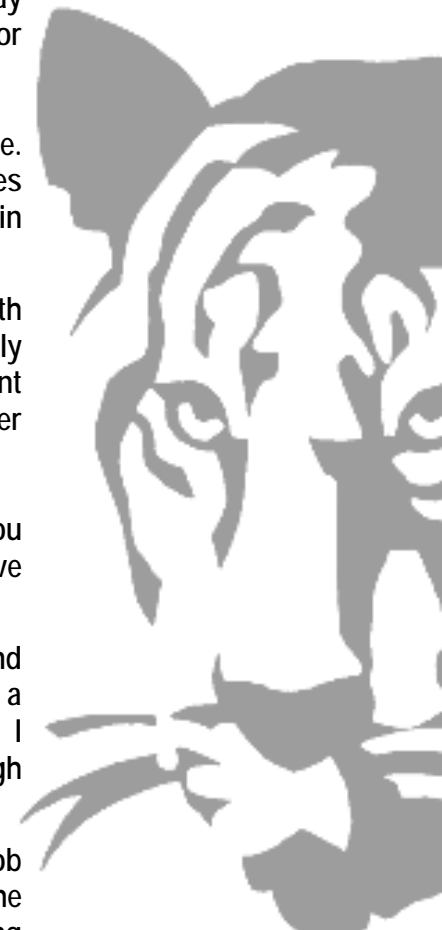
Once you are reasonably satisfied with your mission statement, we recommend that you formally review it at least once a year or whenever you are faced with a significant change in the nature of your business. With corporate clients, I recommend that they go through the mission statement review annually as though one was not already in existence.

This is generally a more valuable exercise than attempting to do an editing job on the document you have. An existing mission statement will influence the nature of your responses, of course. However, going through this thinking process periodically is a healthy exercise for any professional or business.

Once the mission statement is in a form that is reasonably satisfactory, many professionals find it valuable to have it reproduced and posted where it can be seen by those who are impacted by it.

I have seen personal mission statements framed and posted as wall charts, laminated and put on a stand on the individual's desk, printed on the back of business cards, included in descriptive or promotional literature, added as a preamble to professional proposals, and in a variety of other ways which is limited only by your own imagination.

By keeping it visible and referring to it periodically, it becomes a living document which can increasingly influence your own way of thinking and your planning and operating decisions.

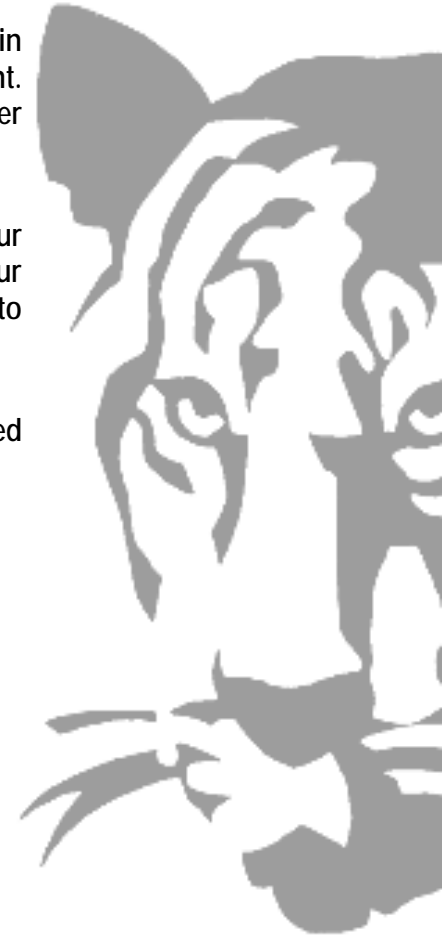


## Summary

As with any organization, what may be the most important planning step in your personal "business" is the establishment of a personal mission statement. This applies whether you are a practicing professional within a larger organization, a member of a professional service firm, or in private practice.

Its purpose is to clarify, for yourself and others, your career direction, your commitment to the business in which you are or expect to be involved and your personal philosophy and values which will influence the way you intend to operate.

With that as a firm foundation, your personal strategic planning can proceed with a clear sense of purpose.



	N.A.	O.K.	Do Now	This Year	Next Year	Future
<b>PLANNING PROCESS</b>						
Career path choices						
Strategic Values						
Personal and professional mission						
Organizational mission						
Strategic analysis						
Personal						
Career growth						
Business development						
Financial						
Long term objectives						
Strategic action plans						
Other						
<b>OTHER PEOPLE INVOLVED</b>						
Spouse/Life Partner						
Children						
Other family						
Employer						
Professional colleagues						
Friends						
Facilitator						
Other						
<b>IMPLEMENTATION</b>						
Strategic planning notebook						
Review schedule						
Graphic display/charts						
Plan modification						
Other						



Selection Process:

1. Identify strategic areas that need to be considered for potential long term objectives.
2. Determine which are the six to eight most important.
3. Identify within each area, the potential results that will move you closer to the fulfillment of your mission.
4. These results should be broad in scope, measurable, and highly visible.
5. Select and reach consensus, with others who are affected, on no more than six to eight long-term objectives that will enable you to be positioned where you want to be at some point in the future.

Where possible, write them in an objective format:

"To have (or become) (the result) by (year)"

Strategic \_\_\_\_\_

Areas \_\_\_\_\_

Long \_\_\_\_\_

Term \_\_\_\_\_

Objectives \_\_\_\_\_

Criteria for Validating a Long Term Objective (strategic)

- 1) Is it measurable or verifiable?
- 2) Will you and others affected by it be able to recognize it when it happens?
- 3) Is it achievable or feasible?
- 4) What major efforts or significant changes must take place in order to achieve the objective?
- 5) What is the likelihood of these happening?
- 6) Is it flexible or adaptable?
- 7) Will it take into account changing circumstances and new related opportunities?
- 8) Is it consistent with the rest of the plan?
- 9) Does this objective move you closer to the positions that have been taken as you constructed your mission, strategic analysis, and strategy?



SELECTED EXAMPLES OF LONG TERM OBJECTIVES FOR  
SPEAKERS/TRAINERS/CONSULTANTS

Strategic Areas	Long Term Objectives
Net Worth	To have a minimum net worth of \$500, 00 by 1995, increasing by a minimum of 10% annually thereafter.
Marketable Services	To have a service revenue mix of approximately 1/3 each in keynotes, seminars, and consulting by 1994.
Marketable Products	To have at least one new marketable product completed and available for distribution each year beginning in 1993.
Markets/Customers	To have a minimum of 75% of my service business concentrated in the following three market segments by 1993: Hospitality, Insurance, and Retail.
Marketing/Sales Plans	To have a minimum of six distribution outlets for our products (other than our own), each generating a <u>minimum</u> of \$5,000 gross profit annually, by 1994.
Publications	To have a minimum of five articles published each year in publications serving our target markets beginning in 1993.
Image - Market/Profession	To become a CSP by 1994.
Family Relations	To reach agreement with my family on at least one major project each year, beginning in 1993, in which all family members play an active role, and to commit my time and resources to its fulfillment. (1993 project to be family study and discussion of one of the Great Books each month.)
Rest and Recreation	To take a minimum of one to two weeks' vacation each quarter beginning in 1993.
Service to Profession	To actively serve on at least one NSA and one local chapter committee each year, beginning in 1993.



Potential Areas	Category			Priority 1,2 etc,	Selection	Notes
	A	B	C			
Personal						
Family/personal relationships						
Health, rest and recreation						
Cultural pursuits						
Service to others						
Retirement						
Career Growth						
Education						
Cert/lic/prof design						
Research/study						
Publications						
Affiliations						
Work experience						
Business Development						
Services/products						
Clients/customers/mkts						
Marketing/sales						
Associates/staffing						
Business operation						
Financial						
Cash flow						
Capital requirements						
Pricing, gross/net profit						
Net worth						



# Selecting Your Areas of Strategic Concern

## STRATEGIC VALUES

INDEPENDENCE/FREEDOM OF CHOICE

OTHERS

FINANCIAL RETURN

FINANCIAL SECURITY

CHALLENGE/RISK TAKING

FAMILY CONSIDERATIONS

GEOGRAPHICAL FOCUS

SERVICE TO OTHERS

PERSONAL LEGACY/ESTATE

PROFESSIONAL/PEER RECOGNITION

PROFESSIONAL RELATIONSHIPS

POWER/INFLUENCE

PRINCIPLES/ETHICS





## JOHN EVANS, AUTHOR, TRAINER, AND CONSULTANT WHO SPEAKS

*An internationally respected expert in the fields of Leadership, Organizational Development, Team Building, Performance Management, Customer Service, Personal Development, Employee Motivation, Change and Stress John Evans has spent the past twenty nine years delivering more than 3900 leading edge Customized Programs, Courses, Workshops and Presentations to business, industry, and government clients.*

*His individualized and customized programs range from groups as small as 10 to as large as 5000. Along with his experience, John provides some of the most advanced human resource assessment tools available in the training, consulting and counseling professions. These tools have allowed organizations to measure and understand the human behavior aspects of virtually every individual in any department within their organization, providing them with personalized roadmaps that enhance and sustain human performance, increase productivity and promote harmony in the workplace.*

*Author Of:*

*“EMBRACE THE TIGER”, How to Survive and Thrive in Climates of Uncertainty  
“SELLING YOUR WAY”, Principles and Strategies for the Transitional Process of Influence*

*And Currently “REINVENT YOURSELF,” Committing to becoming your own Hero*

*A Track Record of Results:*

*Most of a Decade with the thirteenth largest Corporation in the world at the time and the most diversified. He was the youngest man promoted to his position of Corporate Trainer for National Accounts ever, a record that stands today...*

*Five years as an Area Manager and Certified Instructor for six courses with the most famous and successful Training Organization in the world at the time...*

*Three Decades as Owner of a Full Service Training, Consulting, Business Coaching and Professional Speaking firm with the past twenty 23 years primarily working directly under contract with Elements of the US DoD, The Department of Army, The Intelligence Community and Adjunct Professor for the Army Management Staff College’s highest rated Leadership Program personally delivering over 200 courses all over the world from seven regions.*

*Developer of more than Forty Professional Development Courses approved and used through Civilian Human Resource Agencies all over the world...*

*John in 1987 received the highest earned designation for professional speaking "The Certified Speaking Professional" which less than 2% of speakers in the world have received over the past 20 years*

*Entrepreneur owner of three startup companies, two through funding, execution of sales and marketing success*

*The vision of John Evans has always been to help people tap into their unlimited potential and use it to best advantage. This vision carries over in John's personal life with his altruistic work with families of children with life threatening diseases.*

*Please contact John Evans if you are interested in a presentation for your organization.*

