

# Building Your Personal Strategic Plan

By

*Meg Myers Morgan, PhD*

# TABLE OF CONTENTS

<b>Introduction</b>	<b>4</b>
<b>The Skills and Place Matrix</b>	<b>5</b>
<b>Engaging Stakeholders</b>	<b>7</b>
<b>Value Setting</b>	<b>10</b>
<b>Vision Statement</b>	<b>15</b>
<b>Mission Statement</b>	<b>18</b>
<b>Individual S.W.O.T. Analysis</b>	<b>22</b>
<b>Packing Your BAGS (Big Ass Goals)</b>	<b>24</b>
<b>Short-Term SMART Goal Setting</b>	<b>27</b>
<b>Performance Measurements</b>	<b>34</b>
<b>Evaluation Checklist</b>	<b>35</b>

## INTRODUCTION

**Strategic planning is a process used constantly in the working world. Businesses, nonprofits, universities, even departments within organizations use strategic plans to clarify values, set goals, and create an action list. And yet, we don't do this on an individual level. When it comes to our own careers and lives, we need to treat ourselves like a Fortune 500 company (an ethical one with good dental coverage).**

**In this "workbook" you will go through the same steps that an organization undergoes when trying to map out a 3-, 5-, or 10-year strategy. Which means, you can pick how big of a plan you want to make. Maybe for you, figuring out this year is more important than a long-term plan stretching into the next decade. Or maybe you want to build a strategy that takes you all the way into retirement.**

**The thing of it is, though, strategic plans are a great road map, but they are often revisited and adjusted as needed. An organization may have a great strategic plan, but a new CEO may want to shift focus, or change directions. You can do that, too.**

**The point of this exercise is to get in the habit of the process. The value comes from self-reflection, checking in with your gut, reexamining your priorities and your goals, and setting a strategy in place to move you forward.**

**This process will take you through nine steps: finding your spot on the Skills and Place Matrix; engaging your stakeholders; identifying your core values; building a vision and mission statement; preparing a SWOT analysis on yourself; creating both long-term and short-term goals; and finally, setting performance measures. In the end, this will allow you to create a personal strategic plan to submit for your final assignment.**

## SKILLS & PLACE MATRIX

Before you begin your Strategic Plan, you need to think about where you are on the Skills and Place Matrix. By figuring out where you are on this matrix, you can more easily determine how to use your strategic planning time. If, for example, you fall into Quadrant 3, you'll want to base your strategy around Networking within your field to further propel you into a more suitable role. Look over the narrative and Skills and Place Matrix below. Write your name in—or place a star, or stamp some ink, or drive your pencil through—the spot that best represents you. You can be closer to the middle, or farther away from the line, but the point is to think about where you fall on this matrix. On the following page, look over the Quadrant Analysis for clarity on how to move forward with your Individual Strategic Plan.

**Skills:** what you do

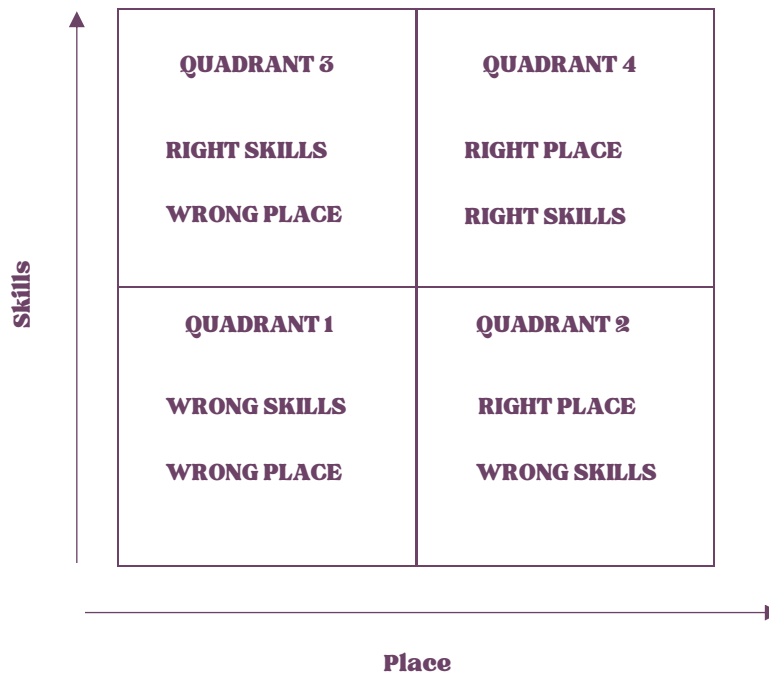
**Place:** where you do it

**Skills:** what you bring to the place

**Place:** where you put your skills

**Skills:** Values, Attitude, Knowledge, Training, Education, Experience

**Place:** Position, Company, Field



## QUADRANT ANALYSIS

**On the next few pages are an analysis of each quadrant. It's helpful to read through each one, but the goal of the exercise is to have you complete the questions for your corresponding quadrant. If you fall on the line between two quadrants, then fill out the questions for those two (or three!) you feel align with your current career struggles.**

**The point to answering your quadrant questions is to help you identify your needs, concerns, and potential roadblocks.**

**Note: If you are newer to the workforce the goal is for you to get on this matrix. Which means you need to focus on getting yourself into Q2 or Q3 (so you need to either build up the skill, or get your foot in the door at ground level with a company/field you love) and work toward moving up to Q4.**

### Quadrant 1: Grow & Network

**If you are in Q1, then you are in a field or company you don't like and you are not quite skilled to change to one you do. You have work to do in both the areas of Growing and Networking. For growth, you need to gain skills in the area. Will your degree help? Training? Can you gain the skills through experience—maybe freelance or volunteer? Think about what it will take for you to get the necessary skills and knowledge to crack into, or rise up in, that area. For Networking, be thinking about connections you can make in the place you want to be. If you are interested in a particular field, think about the best way to insert yourself there. Are there societies to join or connections to make?**

- **What three things could you do to increase your growth potential in the company/field you wish to be in?**

1)

2)

3)

- **What three things could you do to increase your network in the company/field you wish to be in?**

**1)**

**2)**

**3)**

- **What circumstances are currently holding you back from the growth and network?**

## **Quadrant 2: Grow**

**If you are in Q2, you are mostly looking for opportunities to advance yourself in the field. You're already happy or satisfied by your place. This means you're in the right company, or in the right field, but you aren't quite where you want to be within it. Maybe you want a higher position. Or you want to be in a different department. Think about what the people where you want to be possess.**

- **What skills have you identified you will need (but don't have/have enough of) to grow in your industry/field?**

- **What is needed to get those skills?**

- **What resources (time, money, etc) are you able to contribute to this endeavor?**

- **When will you be ready, able, and willing to undergo this skill building?**



## **Quadrant 4: Challenge**

**If you are in Q4, congratulations! This means you are in the right place with the right skills. But this is also a dangerous quadrant because you can easily slip into boredom or stagnation. If you are in this quadrant, you need to focus on new challenges for yourself within the parameters of your role and location. You also need to remember to take stock of what you have. It's always more fun to work toward something than to maintain it, and working toward the awesome job is no different. So don't forget to look around and get excited all over again by where you are.**

**Where and how can you give more within your role?**

**How long to plan to stay in your current role? Within your company/field?**

**What would you like to do after that?**

**What is your succession plan for your role?**

## **ENGAGING STAKEHOLDERS**

**Every good Strategic Plan starts with engaging stakeholders. When it comes to companies or nonprofits, stakeholders can be staff, customers, board members, donors, etc. Anyone who has a vested interest in the organization. For you, your stakeholders are anyone who has a vested interest in your career. That may be your spouse, friends, mentor, coworker. Anyone whose input you value.**

**Now, let me be clear. You are not engaging them because you want them to tell you what to do with your career. You aren't seeking their input on your plan. At least not in specifics.**

**You are seeking out these people for two reasons:**

**ONE—input on you and your potential. Often we are unable to see certain things in ourselves. So you are looking to these stakeholders to help you identify opportunities for growth. Maybe your friend says, "I don't think you realize what a strong public speaker you are. Why don't you do more in that arena?" Point is, you want to get a good picture of who you are and your potential, and we often need an outsider's perspective on some of it.**

**And TWO—you need a Board of Directors for accountability. You need to surround yourself with people who are invested and who want to see you thrive. And those are the very people who will hold you to your plans when you are tempted to slow down or give up.**

**Think of the stakeholders that would best fit into these roles: identifying your potential, and holding you accountable. Further, think about your quadrant. If you need to focus on networking, think about that when choosing which stakeholders to engage. If you need to focus on skill-building, that may be a different set of stakeholders. On the next page list this group of stakeholders. I think five is an ideal number, but there's room to write more if you want.**

## **STAKEHOLDERS**

**1)**.....

**2)**.....

**3)**.....

**4)**.....

**5)**.....

## **NOW ENGAGE THEM**

**The point of this exercise is to identify the key people in your life who can help propel you and champion you as you move forward in your career. I suggest a three-part plan.**

- 1) Meet with them individually. Depending on who it is, the tone and venue changes, but in general you want them to know that you are working on building your capacity as a professional, you value their input and guidance, and you want to know if they have any feedback for you as you work toward your career goals.**
  
- 2) Meet with them again when this plan is finalized. If you are comfortable, walk them through the specifics. If not, just give them the overview so they are aware of your plans. This is important because they can help you line up certain resources, provide introductions, and offer support.**
  
- 3) Build in check-in points with them. It's true that some (or all) of the people on your list are people you see regularly (though it's good to get a more objective professional you admire but don't see regularly). But you need to block out specific times to check back in on your plan and progress. Commit to this with them. Again, it doesn't have to be a super formal "My Monthly Check-In," unless that's helpful for you. It just needs to be regimented enough to keep you accountable.**

## VALUE SETTING

**All people have values. But they don't always know them specifically. They know in their gut what they value, but it's important to specifically get clear with yourself on your values, write them down, and keep them in the top of your mind.**

**HOW YOU WILL DO THIS EXERCISE: On the next two pages are a list of values. It is a comprehensive list but by no means exhaustive, so there is room to add more at the end. Sit in a quiet place, clear your head, and focus. Read through the list and for each word, circle it if it speaks to you; cross it out if it doesn't. You want to move quickly through the list because you are looking for words that speak to you the most, and going quickly will ensure you don't overthink your reaction.**

**Once you have finished the list, look back over what you've circled. Read them again, and this time linger over each word. Do any need to be crossed out that are circled? Once you have the list, look over how many there are. It's fine to have a lot of values—good even—but you need to get down to a Top Five List. The reason for narrowing down is so it will be easy for you to recall your Top 5 at a moment's notice. These are, essentially, the tent poles of your strategic plan. You will develop a strategic plan that aligns with—and supports—these values.**

**So if you have circled more than five values, go back through the circled words and place a check mark or star by the ones you feel the strongest about. Work on this until you are down to the five that are the most meaningful to you. You are welcome to have these values be written like sentences or phrases, but these words should help clarify what you care about and who you are.**

**When you have narrowed down, write your CORE VALUES in the designated area.**

**Acceptance**

**Accomplishment**

**Accountability**

**Accuracy**

**Achievement**

**Adaptability**

**Alertness Altruism**

**Ambition**

**Amusement**

**Assertiveness**

**Attentiveness**

**Awareness**

**Balance**

**Boldness Bravery**

**Brilliance Calmness**

**Candor Capable**

**Careful Certainty**

**Challenge Charity**

**Cleanliness**

**Clarity**

**Cleverness**

**Comfort**

**Commitment**

**Common sense**

**Communication**

**Community**

**Compassion**

**Competence**

**Concentration**

**Confidence**

**Connection**

**Consciousness**

**Consistency**

**Contentment**

**Contribution**

**Control Conviction**

**Cooperation**

**Courage Courtesy**

**Creation**

**Creativity**

**Credibility**

**Curiosity**

**Decisiveness**

**Dedication**

**Dependability**

**Determination**

**Development**

**Devotion Dignity**

**Discipline**

**Discovery Drive**

**Effectiveness**

**Efficiency**

**Empathy**

**Empower**

**Endurance**

**Energy**

**Enjoyment**

**Enthusiasm**

**Equality Ethical**

**Excellence**

**Experience**

**Giving**

**Exploration**

**Expressive**

**Fairness**

**Family**

**Fame**

**Fearless**

**Feelings**

**Ferocious**

**Fidelity**

**Focus**

**Foresight**

**Fortitude**

**Freedom**

**Friendship**

**Fun**

**Generosity**

**Genius**

**Goodness**

**Grace**

**Gratitude**

**Greatness**

**Growth**

**Happiness**

**Hard work**

**Harmony**

**Health**

**Honesty**

**Honor**

**Hope**

**Humility**

**Imagination**

**Improvement**

**Independence**

**Individuality**

**Innovation**

**Inquisitive**

**Insightful**

**Inspiring**

**Integrity**

**Intelligence**

**Intensity**

**Intuitive**

**Irreverent**

**Joy**

**Justice**

**Kindness**

**Knowledge**

**Lawful**

**Leadership**

**Learning**

**Liberty**

**Logic**

**Love**

**Loyalty**

**Mastery**

**Maturity**

**Meaning**

**Moderation**

**Motivation**

**Openness**

**Optimism**

**Order**

**Organization**

**Originality**

**Passion**

**Patience**

**Peace**

**Performance**

**Persistence**

**Playfulness**

**Poise**

**Potential**

**Power**

**Present**

**Productivity**

**Professionalism**

**Prosperity**

**Purpose**

**Quality**

**Realistic Reason**

**Recognition**

**Recreation**

**Reflective**

**Respect**

**Responsibility**

**Restraint**

**Results-oriented**

**Reverence**

**Rigor**

**Risk**

**Satisfaction**

**Security**

**Self-reliance**

**Selfless**

**Sensitivity**

**Serenity Service**

**Sharing**

**Significance**

**Silence**

**Simplicity**

**Sincerity**

**Skill**

**Skillfulness**

**Smart**

**Solitude**

**Spirit**

**Spirituality**

**Spontaneous**

**Stability**

**Status**

**Stewardship**

**Strength**

**Structure**

**Success**

**Support**

**Surprise**

**Sustainability**

**Talent**

**Teamwork**

**Temperance**

**Thankful**

**Thorough**

**Thoughtful**

**Timeliness**

**Tolerance**

**Toughness**

**Traditional**

**Tranquility**

**Transparency**

**Trust**

**Trustworthy**

**Truth**

**Understanding**

**Uniqueness**

**Unity**

**Valor**

**Victory**

**Vigor**

**Vision**

**Vitality**

**Wealth**

**Welcoming**

**Winning**

**Wisdom**

**Wonder**

**My CORE VALUES are:**

**1.**-----

**2.**-----

**3.**-----

**4.**-----

**5.**-----

## **VISION STATEMENT**

**Now you will work on your VISION STATEMENT. This is the vision you have for your life and career far into the future. How far is up to you. I think a great place to start is 10 years down the road. You can certainly scale that back and focus on five years, or you can push it out and talk about your career as a whole and therefore decades away.**

**A VISION STATEMENT must be written as if it has happened (not that it's going to happen). It's stating where you are and what you are doing five, 10, or 30 years into the future.**

**So with that, you're going to fill in a few of the questions below and work toward setting that vision. Once you've answered the questions, you will write a one to two sentence VISION STATEMENT. Keep in mind, this VISION STATEMENT should excite the hell out of you (and maybe scare the hell out of you, too). When you read this VISION STATEMENT you should get such an energy from deep within. If you don't feel excited by it, start over and work on it until you can't wait to get to the place your VISION STATEMENT describes.**

**In \_\_\_\_\_ years:**

**I live (where, what town/country/continent):**

**My residence is a (mansion, houseboat, log cabin, NYC apartment):**

**Major accomplishments I've earned (awards, degrees, accolades, etc.):**

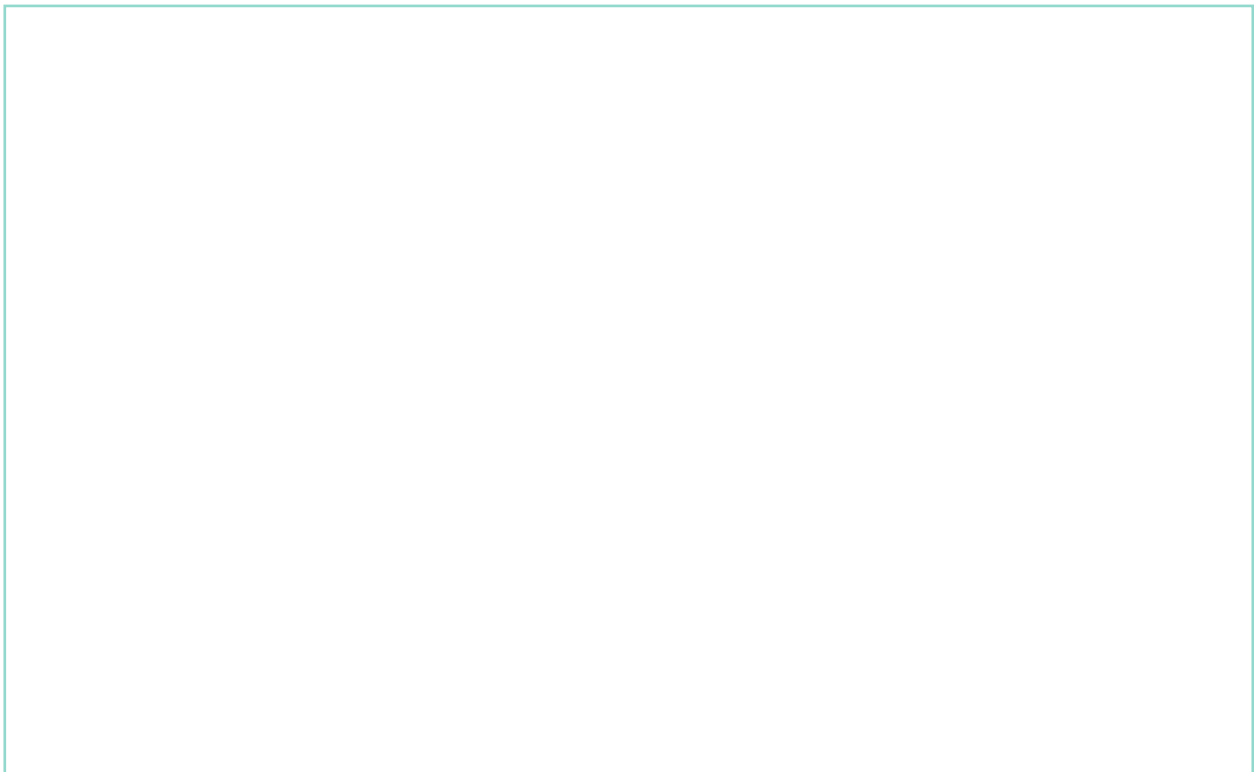
**My family life looks like (significant other, kids, pets):**

**Every day my career makes me feel (emotions, energy level, satisfaction):**

**I'm most excited by (impact of your work, schedule, salary, boss, employees):**

**Now that you've filled out these major components, go back through and circle words that trigger an emotion for you. Focus on these words, and on the excitement you feel for this future. Now write a 1-2 sentence statement to capture this. Again, this should be written as if it's already happened. Write this as if you are five, 10, or 30 years down the road writing what is true.**

**YOUR VISION STATEMENT:**

A large, empty rectangular box with a thin black border, intended for the user to write their vision statement. The box is currently blank.

## **MISSION STATEMENT**

**Now that you've created your VISION STATEMENT, it's time to craft your MISSION STATEMENT. These are different. A VISION STATEMENT clarifies how you want your life and career to look in the future (you picked how far into the future). But a MISSION STATEMENT is how you will live day to day. This is where you take your CORE VALUES and your VISION STATEMENT and figure out how to help live this way day to day. Based on your values, what do you need do to to make your vision a reality? The MISSION STATEMENT will help ground you every day, and through every decision you are asked to make in your career. Because this is grounded in your CORE VALUES and leading to your VISION, this MISSION STATEMENT will center your mind on the everyday work and remind you what is needed.**

**To get to this, you will answer a few prompts. Once you've answered them, look over them and note themes and powerful words. From there, move to the next page and start crafting your MISSION STATEMENT. This statement will be in present tense and will be worded as how you act, what you do, and why you do it.**

**PROMPT #1**

**Think of a story in your professional life that made you really proud. It could have been a small incident you handled well, or a big accomplishment you worked hard for. Just think of a time you felt really proud and write about it here.**

**PROMPT #2**

**What characteristics do you get most complimented on at work? What characteristics about yourself do you love the most? Write about them briefly.**

**PROMPT #3**

**In what way do you want your work to have impact? For whom/what will your work have meaning?**

**Now that you've filled out those three prompts, let's drill it down further by briefly answering these four questions:**

**WHAT DO YOU DO (OR WANT TO DO)?**

**HOW DO YOU DO IT (OR WANT TO DO IT)?**

**WHOM DO YOU DO IT FOR (OR WANT TO DO IT FOR)?**

**WHAT VALUE DO YOU BRING (OR WANT TO BRING)?**

**Now craft your mission statement. These formulas are merely options to get you started, but the goal here is to create a statement in a way that best represents you. Remember: the simpler and more direct your mission statement, the more likely you are to recall it easily and stick to it when distractions crop up (and they will)**

**My mission is to \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ (three or four of your power words) [to, for with] \_\_\_\_\_ (core value or values) for the purpose of \_\_\_\_\_ (relate to main purpose - uniqueness etc) by \_\_\_\_\_ (how will you do it? - uniqueness and special contributions)**

**or**

**My mission is to provide \_\_\_\_\_, for \_\_\_\_\_, through \_\_\_\_\_.**

**YOUR MISSION STATEMENT:**

## **INDIVIDUAL S.W.O.T. ANALYSIS**

**Next you will work on outlining your STRENGTHS, WEAKNESSES, OPPORTUNITIES, and THREATS. While you can certainly do this for any aspect of you personally, the point is to stick to you as a professional. So your SWOT should look at the components within you as a [current job title/desired job title].**

### **STRENGTHS**

**What you are looking for here is any attribute you possess that makes you a great employee. This is everything from personality traits and inherent skills, training you've had, and experience you've collected.**

### **WEAKNESSES**

**Here you need to be honest with yourself. This isn't fun, but it's helpful. Think about where you have come up against issues before. Perhaps a personality quirk, or maybe a lack of some kind of experience/skill you need.**

### **OPPORTUNITIES**

**What you're looking for here are chances to improve yourself as a professional. Maybe trainings, education, experience. But also think about areas you could personally improve on that could help you in the work place. Maybe stronger interpersonal skills or conflict resolution?**

### **THREATS**

**Think about areas in your professional life that could be in danger. Are you in a very competitive field? Are you in a mercurial industry? Think of every way your professional trajectory could be in danger.**

**Fill in the SWOT Matrix on the next page, listing as much as you can inside each quadrant.**

**STRENGTHS**

**WEAKNESSES**

**OPPORTUNITIES**

**THREATS**

# PACK YOUR BAGS

(BIG ASS GOALS)

**At this point, I want you to come up with the biggest, juiciest, scariest professional goals you can think of. Seriously, anything is up for grabs. You can put winning an Oscar on there if you want (just so long as it's relevant to your values, vision, mission, etc.). Point is, you need to dream big in this section. Don't stop to wonder if it's feasible, or achievable at this point, just start writing any and all big dreams that make your heart go thump, thump, thump.**

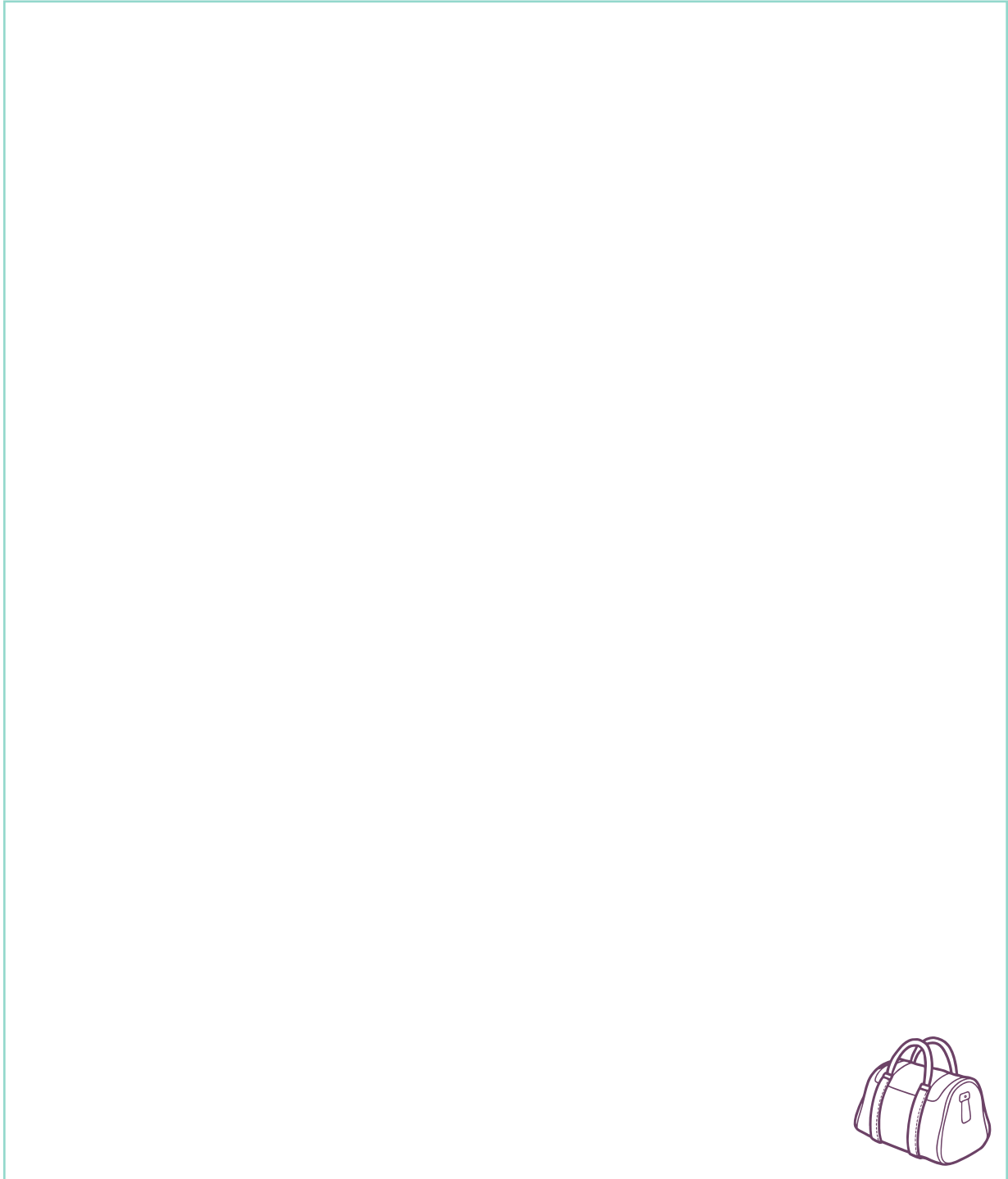
**To start, you will simply list goals you have for yourself. Again, you can put personal goals on there but the eventual point of this exercise is to drill down to your three biggest goals.**

**So, do free writing on the next page. Then we will work to edit your big goals down into three overarching goals for your career.**



## BIG ASS GOALS

**Free-write (meaning without stopping for a set period of time) about the big goals you have for yourself and your career.**

A large, empty rectangular box with a thin black border, intended for free-writing. It occupies most of the page below the instructions.

## BAGS (con't)

**Now that you've dumped all your dreams into the box on the previous page, let's narrow down those dreams to three BIG ASS GOALS. Look back over the box. What excites you the most? What feels worthy of your time and energy? What encompasses your CORE VALUES, gets you closer to your VISION STATEMENT, and aligns with your MISSION STATEMENT? Write down those three BAGs here:**



**BIG ASS GOAL #1**



**BIG ASS GOAL #2**



**BIG ASS GOAL #3**

## SHORT-TERM SMART GOAL SETTING

Let's say one of your Big Ass Goals is to write a book. And you'd like to do that in the next five years. You know you have the smarts and capability to do it, and you know the measurable outcome is a higher degree. Now, it's time to set three Short-Term SMART goals under each BAG. Think of these as milestones on your path to a Big Ass Goals

### **S**

**Specific.** State explicitly what you are going to do. Essentially, the What, Why and How?

### **M**

**Measurable.** The measure of your goal so that you have tangible evidence that you have accomplished it. How will you measure this goal?

### **A**

**Achievable.** This should be a stretch and you should feel challenged, but this is also something you can achieve. Explain how you possess the appropriate abilities needed to achieve the goal.

### **R**

**Results-focused.** Focus on the outcome(s), not the activities. What will the outcome(s) look like?

### **T**

**Time-bound.** There needs to be a timeframe that creates a practical sense of urgency, or results in tension between the current reality and the vision of the goal. Without such tension, the goal is unlikely to produce a relevant outcome. What is the timeframe on this goal?

#### **EXAMPLE:**

##### **Big Ass Goal:**

**I will write a book in the next two years.**

##### **Short-term SMART Goals:**

- 1) I will outline the book's plot by December.**
- 2) I will write one chapter each month starting in January.**
- 3) I will attend the Iowa Writer's Retreat in March.**

**YOUR TURN:**

**BIG ASS GOAL #1**-----

**Short-Term Goals:**

**1)**

**2)**

**3)**

**BIG ASS GOAL #2**-----

**Short-Term Goals**

**1)**

**2)**

**3)**

**BIG ASS GOAL #3**-----

**Short-Term Goals:**

**1)**

**2)**

**3)**

## **PERFORMANCE MEASURES**

**You probably get an annual performance review at work and my guess is you wish you could change parts (or all) of how that review is structured. Most employees cite a lack of feedback, and too vague of a performance review, as a reason for dissatisfaction in their work. Now is the chance for you to shape your review to include what you will find helpful in bringing out the best in yourself as you implement this plan. To capture this, answer the following three questions:**

**1) How will I know day-to-day or week-to-week that I'm successful?**

**2) How will I know when I'm not set up for success and what will I do to change that?**

**3) How will I celebrate my success? What built in milestone celebration will I give myself for motivation and reward?**

## EVALUATION CHECKLIST

**The following is an important checklist before moving on to the final step in this workbook:**

**Does your plan connect your mission to your vision? Make sure all of your goals and strategies align with your vision and support your mission. If there are outliers, modify or delete them. You want all of your energy focused on reaching your vision.**

**Is your plan realistic? Over planning is a common problem. Consider pushing some deadlines out further than you originally anticipated. Nothing derails an otherwise workable plan like missing an early deadline.**

**Is your plan integrated? Make sure that all the elements of your plan support each other.**

**Is your plan balanced? Make sure that you have a good balance between goals that are important and doable, and goals that are lofty and push you. Make sure you balance between capitalizing on what you already know, and reinvesting in yourself to learn more.**

**Is the plan complete? Identify any holes in your plan or potential goals that are unsupported.**

**Is the plan clear? It's easy to write down an action item or a goal that makes sense in the moment, but ensuring that the action makes sense in six months is crucial. Not only that, but clarity leads to easy visualization. And visualization is crucial to success.**

**Do I have ways to measure my success? Are there opportunities along the way that you can factually see (and feel) your success? What will you do to celebrate your wins? How will you handle your setbacks?**

**Are you excited by it? Perhaps most importantly, are you excited by the vision? By the goals? Do you feel yourself desperate to get started? If not, this isn't worth implementing, and you need to work on this until you're so excited you can barely breathe. Once you're excited, you're on your way. When your enthusiasm meets your well-crafted plan, you'll be unstoppable.**