

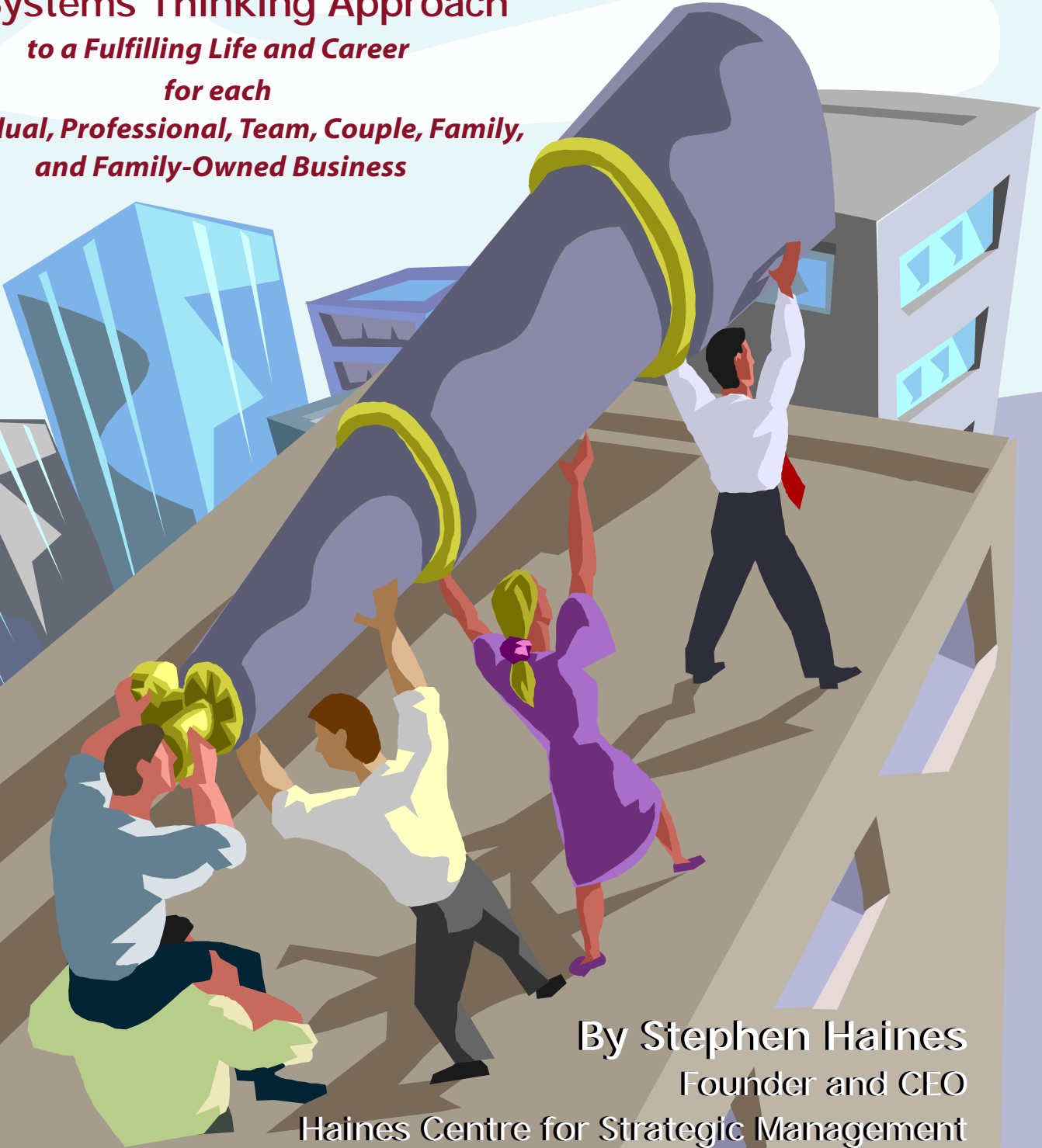
The ABCs of Strategic Life Planning

The Systems Thinking Approach[®]

to a Fulfilling Life and Career

for each

*Individual, Professional, Team, Couple, Family,
and Family-Owned Business*



By Stephen Haines

Founder and CEO

Haines Centre for Strategic Management

Copyright © 2010
The ABCs of Strategic Life Planning
First Edition - 3rd Revision
Systems Thinking Press®
Library of Congress Control Number: 2005929868
ISBN: 0-9760135-2-5

All rights reserved. No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording, or information storage or retrieval system, without permission in writing from Stephen Haines, Founder and CEO, Haines Centre for Strategic Management.

Note on Trademarks

The following Trademarks (TM) are licensed to Systems Thinking Press and Haines Centre for Strategic Management and may not be used without explicit written permission. All Trademarks must carry this mark (TM) and be specifically attributed to Haines Centre for Strategic Management (www.HainesCentre.com):

- Achieving Leadership Excellence™
- Business Excellence Architecture™
- Creating the People Edge™
- Enterprise-Wide Change™
- Quadruple Bottom Line™
- Reinventing Strategic Planning™
- Rollercoaster of Change™
- Smart Start™
- Strategic IQ™
- The ABCs of Strategic Management™
- The Simplicity of Systems Thinking™
- The Systems Thinking Approach®

PREFACE

"Life is an exciting business and most exciting when it is lived for others."

– Helen Keller

Welcome to **The ABCs of Strategic Life Planning**. This book is designed for you to write in, think about, and use over and over again. It is a self-paced format allowing you to read and work on the activities in it at your own pace. **It should definitely not be completed at one sitting.** Our goal is to help individuals, couples, and families of all sizes and types to "practice" Life (and Career) Planning successfully.

This topic is frequently misunderstood and rarely done in our personal lives or in our careers. Therefore we have thoroughly researched and completely built *Strategic Life Planning* based upon three common-sense elements. They are:

#1. Planning is part of Management and Leadership. *Planning is not a fad, activity, or exercise to be completed and then abandoned. Planning can lead the rest of our careers and lives and help us tremendously in achieving our personal life Visions. Thus, planning should be part of a comprehensive Strategic Life Management System as the new way we manage our lives, our relationships, and our careers day-to-day. This new way is focusing on outcomes, our purposes in life. As Stephen Covey says "Begin with the end in mind."*

#2. People support what they help create. *Thus, today each of us as individuals and families must practice Strategic Life Planning, in an involving and participative way, if we want to create a critical support mass for our desired changes. Otherwise our good thoughts and plans will be subject to the dreaded SPOTS Syndrome (Strategic Plan On the Top Shelf...gathering dust).*

The main competitive advantage that any individual, couple or family can have, over the long term, is their reliance on strategic thinking and life planning. This approach provides a way to lead our lives in a proactive and participatory manner, unlocking ideas, skills, and motivations along the way, to achieve the goals of our lives and careers. However, for most of us, working towards our desired outcomes and ideal future in a steady, determined way, is not something we do, even though we acknowledge the value of it.

#3. We use "Systems Thinking" as the framework for this book. *System's Thinking begins with defining the desired future, or "end," first. Then, keeping this end in mind, we plan and implement. The result is a focus on outcomes and our Ideal Future Vision, rather than inputs and routine daily activities as the primary purpose and activity of individuals, couples, or families.*

The most effective strategies for achieving life goals, are those that include, as a primary outcome, care for, and service to, others. We do not live in a social vacuum, and other people are needed if we are to realize the fruit of our planning.


The key to Strategic Life Planning then, is to **focus, first, on outcomes – setting specific outcome measures or goals – and then, on “thinking backwards” from your desired future to plan the way to get there.** It sounds simple, and it is, but achieving it is the challenge of life. This is what distinguishes Strategic Life Planning from other forms of planning. It provides a clear, simple way to approach the direction, decisions, and plans that will take you to your Ideal Future Vision. Other methods typically begin with “today” and then move incrementally forward.

Agree on your ends and outcomes first; then, discuss, negotiate, and understand the “how to” ways to arrive there.

In summary if you want to **design, build, and sustain your life and career, productively and successfully,** this book is for you.

Jayne, my lovely wife, and I do this in our own lives – and you can too. It is our labor of love and we hope you benefit from it as well.

Warmly,



Stephen G. Haines
Founder and CEO
Haines Centre for Strategic Management
San Diego, California

***Welcome to the World of Strategic Career
and Life Planning!***

About This Book

"Strategic Life Planning is the most effective time management tool ever invented."

The ABCs of Strategic Life Planning is a different kind of book – one that is meant to be written in by the reader. Procure a copy for each participant and/or family member. It is meant to be used by each of you. Mark it up as you go along in a "self-paced" fashion. You will gain the maximum benefit from it if you follow the exercises in sequence. However, this book is meant to be picked up and worked on, but then put down for reflection time, and then picked up again for further work. This opportunity to work – then reflect and discuss on what you've each written – is how to get the most value from this book.

The objective of this book is to help individuals, couples, and families of all sizes and types to "do" Strategic Life Planning successfully. We will show you how to do planning in a tailored, quick manner; yet holistic and integrated enough to create a critical mass of motivation for successful implementation and change in your lives and careers.

However, this book is unlike any of the other few books available on the topic of Strategic Life Planning. Instead of the traditional view of planning, this book "Reinvents Career and Life Planning" in a much more systematic and participative way. The ultimate goal is to help design (create), build and sustain individuals, couples and families with highly fulfilling lives and careers.

Strategic Life Planning (and other publication titles listed in the back of this book) can be used effectively in a number of ways. Here are some possibilities:

- **Career Development Workshops and Seminars.** The book is ideal for either prework reading or as an "in-house" career development workshop or seminar. With the basics in hand, the quality of participation will improve. More time can then be spent on extensions and applications during the program. This book is highly effective as a tool when used under the guide of a facilitator through an entire session.
- **Individual Study.** This book is self-paced; all that is needed is a quiet place, some time, and a pencil. By completing the exercises, the participant will not only receive valuable feedback, but will also identify and plan practical actions for self-improvement and career development. In fact, you can use this book to develop a full Strategic Life Plan for yourself.
- **Couples and Families.** This book is also designed for couples and entire families to strategically plan and implement their Ideal Life and Career Future Vision successfully. My wife Jayne and I do this and so do many others.
- **Family-owned business.** This book is an invaluable tool for each member engaged in running a family-owned business. It is a superb way to:
 - 1) become aware of, and begin to pursue, your own vision and goals of your life as the context within which to run your family-owned business, and
 - 2) understand and assist other family members in pursuing their careers and lives as well.

- **Distance Learning.** Books can also be sent to those not able to attend family training sessions.
- **Schools and Children.** This book can and should be used in a variety of career and life learning and planning situations in schools. “What you believe – you can conceive”. Let children complete this book in a school classroom and watch their motivation to learn grow and grow.

The uses for Strategic Life Planning are almost endless

One thing is for sure – after it has been read and written in – this book will become reviewed, thought about, and used again and again, until it becomes dogeared.

Thus, choose how you want to use this tool, and...

...Go for it!



DEDICATION

*This book is dedicated to all my family-owned business clients,
from whom I have learned, and continue to learn,
so much about families, love, life and careers.*

*It is also dedicated to children everywhere.
If I could change only one thing in life, it would be
to require children, at all levels of schooling
(elementary, middle and high school),
to practice Strategic Planning
for their lives and future careers.*

– Stephen Haines

About the Author

Stephen Haines is the founder and CEO of Haines Centre for Strategic Management, located in San Diego, California. He is internationally recognized as the world's foremost authority in the field of strategic management, as it relates to the successful application of Systems Thinking to create business excellence and superior results. Steve has over 30 consecutive years of CEO level experience, working with over 300 CEOs in complex and diverse international situations. His and the Centre's purpose is to assist CEOs in developing and sustaining high performance organizations in today's dynamic environment. The Centre has Master Consultants as Partners and Principle Affiliates with offices across the United States, Canada, and in over 25 countries worldwide.

Steve personally serves senior management and boards in a wide variety of private and public sectors. His career focus is using his extensive "best practices" research to lead dozens of major consulting projects. These have included mergers and acquisitions, high growth, turnarounds, restructuring, and strategic transformation. Steve specializes in strategic planning and transformational change. These changes include a strong emphasis on enhancing Leadership Competencies through executive coaching, leadership development, HR management, and executive team building. These organization-wide changes also include the realignment of delivery processes and the attunement of peoples' hearts and minds needed to create customer value.

From Steve's extensive research, and 20+ years experience in Systems Thinking, the Centre has copyrighted state-of-the-art frameworks and processes for *The ABCs of Strategic Management™* (Planning, People, Leadership, and Change), *The Rollercoaster of Change™*, and *Business Excellence Architecture* to guide organization design and Enterprise-Wide Change. He is also the architect of *The Systems Thinking Approach® to Achieving Leadership Excellence* and its six natural core competencies, found nowhere else in the broad field of Organizational Development.

Prior to founding the Centre, Steve was president and co-owner of University Associates (UA) Consulting and Training Services (a pioneer firm in the development of human resource practitioners and their organizations). He was the architect of UA renewal before devoting his full-time attention to strategic management and change through the founding of the Centre.

In addition, Steve was Executive Vice President of Imperial Corporation of America, a diversified \$14 billion nationwide financial services firm. Prior to that, he was Senior Vice President of Freddie Mac, a \$32 billion financial institution. Steve has been a member of eight top management teams – both in the United States and Internationally – with corporate responsibilities for all aspects of organizational functions, including planning, operations, marketing, PR, communications, finance, HR, training and facilities. His career has included executive positions at MCI, Exxon Enterprises (QYX), Sunoco, and Marriott Corporations.

Steve has an MSA in Organizational Behavior, with a minor in Financial Management from George Washington University, and has completed requirements and dissertation research for his Ed.D. in Management. He has a BS in Engineering from the U.S. Naval Academy at Annapolis, MD (with a minor in Foreign Affairs) and is a graduate of the DOD Human Goals Institute. As a former Naval Officer he has flown Navy jets, piloted ships, and served in Vietnam.

Steve is today's new breed of "world-class executive consultant," providing priceless value-added advice as: 1) a Master strategist and business expert; 2) a Systems Thinker who relates organizational change to "the natural way the world works" to maximize effectiveness; and 3) a leader with outstanding communications skills, especially effective in facilitating difficult executive groups. He is a captivating, accomplished keynote speaker, and a prolific author and publisher.

Summary

Steve's diverse background includes consulting to hundreds of firms, including 1,000+ CEOs, and the creation of the extensive "Best Practices" Haines Strategic Library on Strategic Management.

He has received numerous Who's Who honors, written 16 books, over 50 articles, and developed the Centre's Comprehensive Strategic Library (12 volumes, over 7,000 pages). He has taught over 70 different kinds of seminars and is in demand as an insightful keynote speaker at international conferences...with a special emphasis on CEO and board issues. He is a premier TEC Organization Resource (groups of 15 CEOs) with over 100 presentations to his credit. He was also the co-leader of the prestigious Banff Centre for Management's two-week Senior Executive and Leadership Development course. He has also been on nine boards, including a Credit Union Chairmanship. His personal interests include family, community service, sports, sailing, travel, photography, art, and design.

"Make a Difference in Other People's Lives!"

– Table of Contents –

PART I	Introduction To Strategic Life (and Career) Planning	10
	Welcome to the World of Strategic Life Planning – and Backwards Thinking	11
PART II	What Is Strategic Life Planning – An Educational Briefing	13
	Strategic Life Planning – Backwards Thinking	14
	Planning is a Part of Living a Fulfilling Life	15
	People Support What They Help Create	17
	System’s Thinking – A New Orientation to Life	19
	A Summary: Definitions of Life and Other Planning	25
PART III	Why Do I Need Planning?	27
	Phase E: Revolutionary and Global Changes	28
	Implications for Individuals, Couples and Families	28
	Benefits of System’s Thinking	32
	What are the Common Mistakes We Make?	35
	What Other Choices Do We Have?	36
	Plan-to-Plan: The Organizing and Tailoring Step	37
PART IV	What Are The Five Basic A-B-C-D-E Phases?	47
	Phase A: Creating Your Ideal Future – The Place to Begin	48
	Phase B: Measuring Success-Ten or Less Outcomes/Goals	71
	Phase C: Developing and Converting Strategies to Actions	78
PART V	How Do I Implement Plans Successfully: Phase D?	114
	Phase D: Implementing Change Successfully: Plan-to-Implement	115
	Change Leadership Team – The Key to Success	122
	Annual Strategic Reviews – Updating Your Plan Yearly	127
	Recapping: Creating a New Way to Live Your Life day-to-day	131
	Summarizing: A Challenge For the Future	133
	Appendix: Strategic Life Plan of Steve and Jayne Haines	135

PART I**Introduction to
Strategic Life (and Career) Planning
and
“Backwards Thinking”**

*“Problems that are created by our current level of thinking
can’t be solved by that same level of thinking.”*

– Albert Einstein

*“A strong passion for any object will ensure success,
for the desire of the end will
point out the means.”*

– Ben Stein

“People can alter their lives by altering their attitudes.”

– William James

Welcome to the World of Strategic Life Planning or the “Land of Backwards Thinking”

“The best way to predict your future is to create it.”

– Stephen Covey

Without a clear roadmap, Strategic Life Planning can be a confusing process. This book is designed to help clarify what it is all about. It will help you de-mystify and illuminate terms. It will provide a simple, “Five Phase” **A B C D E** System’s Framework to unlock the mystery of Strategic Life Planning and enable you to do it successfully.

This book is designed in a self-paced manner, with many different ways to use it profitably and successfully. You will discover why planners are becoming an endangered species, even though career and life planning is becoming increasingly important to individuals, couples, and families. We all want to be “successful,” however we define it.

Strategic Life Planning and Backwards Thinking are the place to start if you want to be successful and profitable.

The great successful men and women of the world have used their imagination...they first think ahead and create a mental picture of their future. They then think backwards and go to work materializing that picture in all its details, filling in here, adding a little there, altering this a bit and that a bit, but steadily building – steadily building.

Clarity and simplicity are the keys to success in life. Life is more complex than it was 30-50 years ago. It moves faster, is more competitive, and is more expensive. Clarifying your definition of success in this complex world, and simplifying and focusing your strategies to achieve that success, is what this book is all about.

This book is organized into five parts:

Part I is an overview of what to expect in the other four parts.

Part II and **III** are an Overview and Executive Briefing on Strategic Life Planning. They are intended to be read first as pre-work (we call it Plan-to-Plan) for the actual self-paced completion of your Strategic Life Plan.

In Part II’s Executive Briefing we will also discuss Strategic Life Planning and its oftentimes confusing terminology. We will also cover the three seemingly simple elements of career and life planning that have far-reaching implications. Next, we will cover the three main goals of Strategic Life Planning and the five **A B C D E** phases you will use in this book to guide your self-paced work.

Part III is key to the Executive Briefing and Plan-to-Plan prework. It looks at Strategic Life Planning in light of the revolutionary, global changes happening in the world today. Then, it looks at its applications in our careers and lives.

Part IV is the heart of this book. You actually develop the core **A B C D E** phases of your own Strategic Life Plan (and document) through this flexible self-paced format. Here, we take you through the world of Strategic Life Planning and Backwards Thinking in a phased **A B C D E** detailed fashion.

They will prove useful to you, whether you are young or old, in or out of school, in a full-time career or not – in other words, their use is almost universal. This system's framework is already being used successfully across America, Canada, and around the globe.

Part V will assist you in the action planning that you need to do, once you have completed your Strategic Life Plan. It will walk you through a Yearly Project Map to guide your changes and implementation. This Map will help you use Strategic Life Planning as your NEW way to manage your life and your career, day-to-day, in a practical fashion.

In the **Appendix** we review a sample Strategic Life Plan. Steve and Jayne Haines have developed their own Strategic Life Plan using this format, and so can you.

Now that you have an overview of our book, and know what to expect, let's begin right now to get educated and "Strategically Plan for your Career and Life!"

Focus on Outcomes first; and always serve others!"
"Begin with defining your Ideal Future and then
Think and work Backwards to that Future.

PART II
What is Strategic Life Planning?
"An Educational Briefing"

"Plans are nothing, planning is everything."

– Dwight D. Eisenhower

*"The greatest discovery in our lives is that human beings,
by changing the inner attitudes of their minds,
can change the outer aspects of their lives."*

– William James

*"The difference between a successful person and others
is not a lack of strength, not a lack of knowledge,
but rather a lack of will."*

*"You become successful the moment you start
moving toward a worthwhile goal."*

Strategic Life Planning: Getting Started with Backwards Thinking

In life, you get what you plan to get!"
– Laurie Hyde

*"I don't know what your destiny will be, but one thing I know...
the only ones among you who will be really happy are those
who will have sought, and found out how, to serve."*
– Albert Schweitzer

Planning is a misunderstood term, and an often irrelevant and discredited function. In this reinvented model and framework, we define it in this broad way:

Strategic Life Planning is a dynamic, "backwards thinking" process by individuals, couples or families...

- 1) *that first defines the individual ideal future vision, and then, the core directional statements (strategies) required...*
- 2) *for a consistent, meaningful, ongoing way of living your career and life...*
- 3) *that drives the achievement of this future vision.*

You obviously want to successfully develop and implement a Strategic Life Plan (or else why read this book?). The definition above tells us that we need to invite everyone who will be involved in your Strategic Life Planning process to first, do these exercises individually, and then, collectively share them in a way which allows each of you to support each other.

The way we typically do this in our practice is the same way you should do it with this book; namely conduct an Executive Briefing and Plan-to-Plan day to help you get educated and organized about Strategic Life Planning.

Parts II and III of this book are designed to assist "educating and organizing" yourself, and others involved, before you begin actual Strategic Life Planning. This is the first step in our Strategic Life Planning Model. It is one that is often overlooked, with disastrous consequences later on, when the planning or the implementation fails.

Note: Read and complete Parts II and III as prework and the Plan-to-Plan Step #1 before beginning actual Strategic Life Planning in Part IV.

Simple Premise #1:
Planning is Part of Living a Fulfilling Life

*"Leadership is one of the highest forms of service.
It is best exercised when it freely motivates others to a decision that is really theirs –
but which may never have been reached without the leader's beneficial influence."*

Action: Any person, couple, or family embarking on Strategic Life Planning must first ask this question: Do you think Strategic Life Planning is:

1. an event?
2. a process?
3. a change in our roles and career? - or -
4. a change in the way we run our lives day-to-day?

While the complete answer is **"all of the above,"** Strategic Life Planning must culminate in a significant change in the way we live our lives, day-to-day. This is a key difference between our model and most others that tend to suffer the fatal **"SPOTS" Syndrome** (Strategic Plans On Top Shelves – gathering dust).

To understand further how to proceed from good career and life planning to successful implementation, as the new way to run your life, day-to-day, answer the following question.

Action: What are the five generally accepted functions of management (whether self-management or the management of others) and where does planning fit into it?

1. _____
2. _____
3. _____
4. _____
5. _____

If you said words similar to the following, you got it right:

1. planning
2. organizing
3. staffing
4. directing, and
5. controlling.

If you answered this correctly, you also must have a good memory from your days in school. Most people asked this question have long since forgotten the answers.

As simple as it might seem, most people have forgotten that planning is a primary function of successful management in our careers and lives. Businesses of all types plan; why shouldn't we as individuals do so too? The crush of all the "How-To" fads, theories, writings, and stories in the media have helped us lose sight of the basics. Remember, our goal in this book is always to clarify and simplify!

People seem to have lost the basic fact that planning is a part of life: It is the first step in "How To" live a fulfilling career and life. It should lead all other functions of managing your life and career successfully.

If you don't want anything to change, why bother to plan?

Our Strategic Life Planning and Change Management structure in this book is focused on the arduous implementation of real change – a change in all the diverse human behaviors that collectively make up our lives and careers. **Changing human behavior for an individual-focus requires a continual reinforcement of new behaviors.** You must counter the natural human tendency to repeat familiar behaviors and habits of the past.

Thus, it cannot be stressed too early that this Strategic Life Planning and change processes must be publicly committed to by each of you to key stakeholders in your lives. They are your support group.

This leads to our last point on "planning as a part of our lives." When doing planning, there are three goals; not just one, to keep in mind.

GOAL #1: Develop a Strategic Life Plan for our Lives and Careers.

GOAL #2: Ensure its Successful Implementation.

GOAL #3: Continually Improve and Sustain High Performance throughout our Life.

Any strategic management structure and system must look at all of these goals. *However, the only true goals are #2 and #3:*

Simple Premise #2:
“People Support What They Help Create”

*“The more you are like yourself, the less you are like anyone else.
That makes you unique, and helps you be creative.”*

– Walt Disney

Any individual, couple, or family’s first year of Strategic Life Planning involves setting in place the necessary Strategic Life Plans and documents. It also involves creating a critical mass for the desired changes.

In addition to the actual planning you do yourself, there is a **“Parallel Involvement Process”** involving all other team members as well as other key stakeholders (“anyone with a stake in the success or failure of your plan”) in a meaningful way. In other words, who else is close to you and that you trust who could play “devils advocate” and/or coach, mentor, supporter for your plan implementation? You need to gather input from them on each draft document as it is developed, and prior to its being finalized. This not only increases their ownership of your plan, but, it improves the plan itself as well.

This concept is very simple; it is nothing more than the fact that you should not plan in a vacuum. Instead, involve the people who matter to you (or who will help with implementation) as you do your planning. Don’t wait until you are finished planning or they will be less likely to support you in implementation. In addition, the added benefit you will receive is a whole host of new and different ideas to improve the quality of your actual plan itself. Different perspectives can yield a wealth of opportunities and ideas.

The best way to ensure the success in involving others is through face-to-face discussions. When holding these Parallel Involvement Process discussions, listing the following purposes will help keep you focused and successful in the actual meetings.

Parallel Involvement Process Meetings (with other Key Stakeholders)

Purposes:

1. To explain the planning effort and their (key stakeholders) importance to it.
2. To explain the draft documents.
3. To get input and feedback.

Guarantee: Key Stakeholders’ Parallel Involvement Process feedback is valued and will be seriously considered.

Limit: Input is being gathered from many people. Therefore, it may impossible for each person’s input to be automatically placed in the final document.

Action: Share each part of your own Strategic Life Plan with

- (1) other family members (spouse, significant other, or family members)
- (2) other key stakeholders

Any planning process that does not include being open to involvement, the ideas of others, and being open-minded enough to be personally influenced by worthwhile ideas, will have serious problems with successful implementation. We live in an interdependent world, like it or not. In addition, key to this critical mass of commitment – each individual needs to develop twelve-month annual plans, under their larger Strategic Life Plan umbrella.

The development of twelve-month annual “action plans” allows you to be specific about the first set of actions you need to take. Strategic Life Plans are the blueprints; annual action plans are what you do.

This need to link levels of Planning into a System is a commonly missed concept (and a serious omission). It is what we call “strategic consistency, yet operational flexibility.” It is the hallmark of successful career and life skills and practices.

THE GOOD LIFE

*There are those who pass like shops in the night,
Who meet for a moment, then sail out of sight
With never a backward glance of regret;
Folks we know briefly and quickly forget.
Then there are friends who sail together
Through quiet waters and stormy weather,
Helping each other through joy and strife.
They are the kind who give meaning to life.*

– Author Unknown

Simple Premise #3: Systems's Thinking: A New Orientation to Life

"Believe that life is worth living, and your belief will help create that fact."

– William James

"You have to believe in happiness or happiness never comes."

– Douglas Malloch

"We are what we believe we are."

– Benjamin N. Cardozo

The last of our three simple premises is the framework for all life planning and change to follow in this book. The Systems Thinking Approach® is the way to "clarify and simplify" your planning and implementation. It has four key phases that will be used as "locators" or "guideposts" throughout this planning.

Books written on Life (and Career) Planning have dealt mostly with today, and extrapolated or forecasted into the future. **Today's planning, however, must start with your future in mind, as the place to begin.** Why? It's just the commonsense notion of knowing where you want to go before you get into a car and start driving.

If you don't know where you're going, any road will take you there. – Yogi Berra

Further reinforcing this notion of where to begin planning is the following:

*Goal setting and careful goal selection
is the #1 criteria for success in all the literature
(i.e., establishing a vision of your future and your purpose and meaning).*

If we really want to create a high quality life and career, we need to make all of our planning and implementation fit and work together as an integrated system. The word "system" however, is often overused and frequently misunderstood. To ensure that we are thinking together and using the same terminology throughout this book, let's define the word *system*:

System: *"A set of components that work together for the overall objective of the whole (output)."*

Action: Since a picture is worth 1000 words, draw picture of what any functioning system might look like? Then compare it to the "system" picture of our Systems Thinking Approach® on the following page.

Draw your picture of a working system on these two pages.

(Hint: Keep it simple, but be inclusive of all organizational functions.)



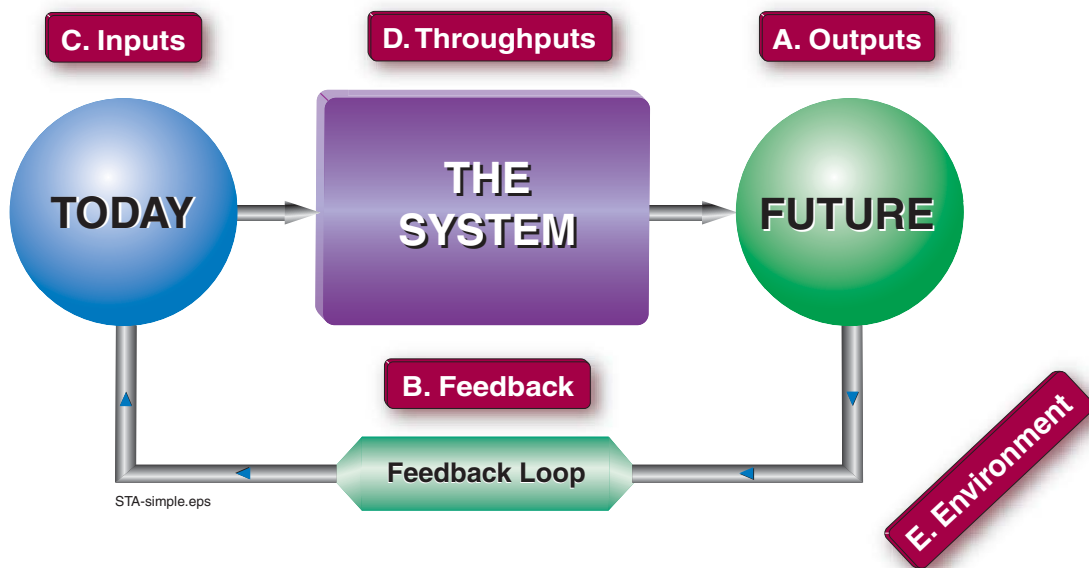
Now view our Systems Thinking Approach Model...

THE SYSTEMS THINKING APPROACH™

"A New Orientation to Life" – Our Core Technology STRATEGIC THINKING

"From Complexity to Simplicity"

Systems: Systems are made up of a set of components that work together for the overall objective of the whole (output).



It doesn't seem to matter whether the system is a human body, a copy machine, a car, a couple, family, or a manufacturing plant. These five key elements act as a framework (or locators and guideposts) for Systems Thinking. (These five elements are derived from General Systems Theory, a comprehensive, scientific method of considering all systems as consisting of common elements, within a generic framework that can be applied to ANY system).

Thus, we call these five key elements the A-B-Cs (D and E) of Systems Thinking. They are also the five Phases of Strategic Life Planning – the foundation and framework of this book.

As in all A-B-Cs, the place to start is with A; or in this case, Phase A – the Outputs. Then, you work backwards to today and plan the strategies, or primary means, to achieve your Output. In other words there are six questions to answer:

A Outputs:(Phase A) that define your ideal future success in your own terms. It asks the question:

Question #1: "Where do we want to be in the future at time X" (i.e., our ends, outcomes, purposes, vision, mission, goals, etc.)?

Then, we can devise a way for our:

- B** **Feedback Loop (Phase B)** to measure output success and feedback the status of the results. It asks the key questions:

“Question #2: How will we know when we get there? What is our measurable scoreboard/set of goals or feedback for success?”

Then, you can evaluate these measures to decide if you need corrective actions and feed them back as:

- C** **Inputs (Phase C)** or information to use as your primary means to decide how to move forward from today.

It asks the questions:

Question #3: Where are we today (our issues, problems, and strengths)?

Question #4: What primary themes, strategies or major methods should we take to close the gap from Phase C - today - to Phase A - our Ideal Future?

These strategies should lead us to:

- D** **Our Throughput or Process (Phase D)** that consists of a set of specific actions and changes, again, to achieve your **Outputs** (so we’ve come full circle, as all systems do). It answers the very specific and immediate question: What specific actions must we take to lead us to our desired Ideal Future Vision?

- E** Of course, as the picture shows, this circular system’s loop occurs within a dynamic and ever-changing **“E” or Environment, the 5th System key element.**

Question #5: What is changing in the environment that affects us the we must take into consideration?

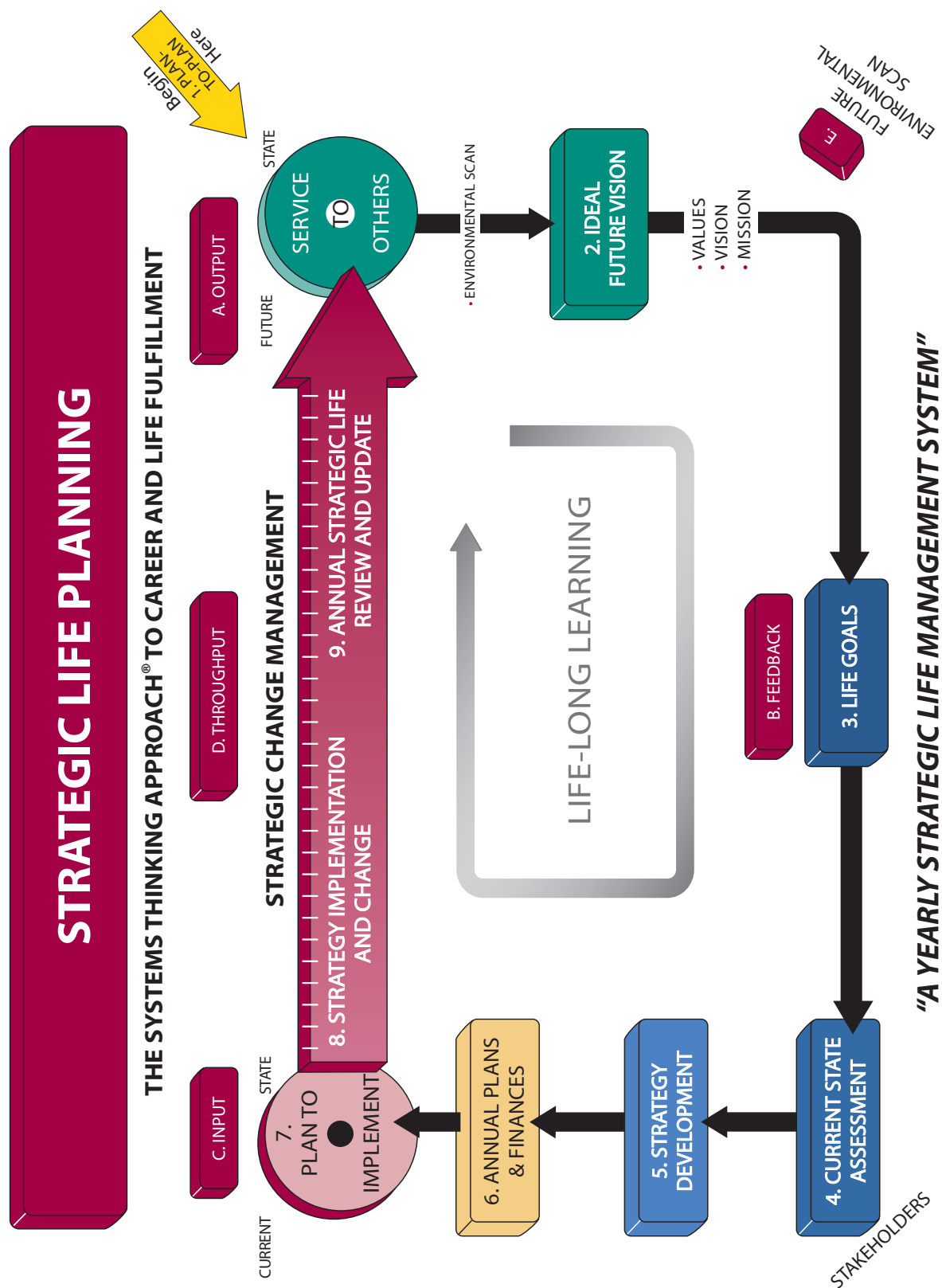
These **A B C D E** phases and sequence are true Systems Thinking. They should become your **“Orientation to Life”** if you want to be highly successful, no matter what your occupation or desires.

In **Strategic Life Planning** this is our last key point; **the need for every person, couple or family to become outcome-oriented and system-focused on serving the needs of others in our personal lives.** Self-aggrandizement and the “me” generation is out. Serving others is in!

Examine our full **Strategic Life Planning Model** on the next page and see how it is based on these three Simple Premises and their key points.

You must guide this process as part of your self-management system to serve others. You must involve your key stakeholders in the Parallel Involvement Process and then develop annual action plans as a full Strategic Management System.

Our Model uses these five **A B C D E** Phases of Systems Thinking as the phases, or guideposts to a successful and fulfilling Strategic Life Plan.



A Summary: Definitions of Life and Other Planning

"What we perceive comes as much from inside our heads as from the world outside."

– William Jones

This has been a brief glance at Strategic Life Planning. The systems framework has been used in order to, not only plan and implement change in an organized fashion, but to clarify the various planning terminology. This model is based on a literature search of 14 other planning models. **What was consistent about these models was their lack of a system's framework and a consistent set of terms between them.**

Many of the planning models we researched also did not start with the output or end in mind.

Fortunately for us, the **A B C D E** phases of our Strategic Life Planning and systems framework give us **four locator points and guideposts** to clarify all these confusing terms.

Phase E (Future Environmental Scan): This is a key element in planning to ensure that we don't plan in a vacuum, but know what is going on in our environment and how we want to fit our Strategic Life Planning into it. **It is the context for our plan.**

Phase A (System outputs or outcomes): We describe this in our model as the "Ideal Future Vision" we want to achieve. It is the ends, the results, and our **personal reason for existence**. It is our Vision, Mission, and Core Values. **In Strategic Life Planning, we start at Phase A, "define our ideal future," and then work backwards to create it.**

It is important to differentiate here between a "Vision" and a "Mission" statement. A Vision is usually seen as your "guiding star," or dreams and aspirational hopes, even if they are never quite fully realized. They represent your ideal. A Mission, on the other hand, is more pragmatic and answers the question of "why we exist" – our unique purpose. It answers **who** we want to serve, with **what** talents and assets we have, and **why** we want to do this.

Phase B (The feedback loop in a system): This is the "results" information that we develop and review to keep us on track. Feeding back general, but wonderful sounding words, such as those in a Vision statement, are not concrete enough to be useful to most people. Thus, we need a set of **"Outcome Measures" or Life Success Factors or Goals that are quantifiable and specific** to feed back to ourselves, and our key stakeholders, to help keep us honest and focused.

Phase C (The inputs to our actions): This is the locator or place where more traditional time management or long-range planning begins; with an analysis of where we are today. The consequence of this is that "life as usual" is the result. **In contrast, our Model defines these Inputs as going beyond just an analysis of today to developing the Core Strategies or primary means for us to use as guides to our daily life and career.**

In our model, these core strategies are the primary means or approaches (i.e., “the glue”) that hold our actions together from strategic ideas to annual action plans.

Phase D (Individual actions, behaviors, and follow-up tracking of implementation): These are the actions, behaviors, tasks, activities or tactics we will actually commit to doing. They will also include regular follow-up meetings to review the progress status of Strategic Life Planning achievement.

Lastly, they include an **Annual Strategic Review (and update)** of the strategic and annual action plans and priorities in order to keep the plans current. This is the key to **Goal #3** “Sustaining high performance in our lives and careers.”

Finally, to recap our definition of Strategic Life Planning very clearly:

Strategic Life Planning is a dynamic, backwards thinking process by individuals, couples or families...

1. to first define their individual ideal future vision, and then the core directional statements (strategies) required...
2. for a consistent and meaningful, ongoing way of living your career and life...
3. in a way that drives the achievement of the future vision.

Your Strategic Life Plan itself is a blueprint. Your annual action plans have the specific yearly details.

Background Note:

This Strategic Life Planning Model is based upon the Systems Thinking Approach®. **We developed it based on a literature search of 14 different, popular planning models, none of which, unfortunately, used Systems Thinking.**

Further, this Model is the result of Steve Haines’ own experiences in running the planning function for three different firms, as well as his in-depth exposure to the top names in the field, such as Kami, Ackoff, Pfeiffer, and Migliore. Our original model draft was subjected to our own Parallel Involvement Process, as well as a critique and analysis of numerous drafts, preceding our final model, by leading practitioners and experts in the field.

It was refined again and again based on client feedback from schools, family-owned businesses, and our own Strategic Life Plan experiences. It is now, formally, our third generation model, based on over 12 years of solid experience using it in the real world with many individuals, couples, and families, as well as teams, departments, family-owned businesses and firms of all types.

PART III
Why Do I Need Planning?

"If you don't know where you're going, any road will get you there."

– Yogi Berra

"When you fail to plan - you plan to fail."

"Purpose is what gives life a meaning."

"Believe and you will succeed."

Revolutionary and Global Changes

PHASE **E** : The Future Environment

"The more natural and real you are, the more creative you can be because you can see what needs to be done and you can respond."

– N. Noane

The past 20 years have seen astonishing changes all over the globe. Just think about some of the events that come to mind. The fall of the Berlin Wall, the end of the Cold War, the break-up of the Soviet Bloc, a re-united Germany, the emergence of China and India as world powers, global terrorism, the Internet, a 25-nation European Economic Community, the break-up of AT&T (twice), the decline and renewal of IBM, world dependence on computers, wireless telecommunications, satellites, the bio-genetics revolution, NAFTA and CAFTA, and many more.

Other world-wide changes can be expected to grow more prominent over the next ten years, including biotechnology research, more powerful super-computers, greater Internet development, virtual reality applications, space-age metallurgy, and new free-trade agreements beyond NAFTA/CAFTA, including full-scale trade blocs in South America and among Asian countries.

While once it was Communism, today global terrorism is the critical threat of our time; concern over the condition and future of the world's environment continues to be debated; and satellite networks have thoroughly changed the way the world communicates. Governments are in continual upheaval and change, with increasing violence and local wars. The U.S. cultural profile continues to migrate toward minorities becoming they majority. Giant "infotainment" complexes control large segments of the media.

What new and existing industries will grow dramatically in the 21st Century?

In short, we are in an era of revolutionary change. It is fundamental, drastic, radical, and global. These are incredible times of global and company restructurings, downsizings, faster and faster change and obsolescence, unforeseen events, and fierce world-wide competition. So, what does this all mean to us as individuals, to our careers, and our lives as couples and families?

Implications for Individuals, Couples, and Families

"What are the implications of all this revolutionary change for us and our futures? In today's workplace, almost everyone is involved in some type of fundamental change. These may be a culture change, a turnaround situation, a high growth and market opportunity situation, international and global expansion, a merger or an acquisition, a downsizing or some other form or what is now often called a transformation or a paradigm shift.

Hint: Take time now to scan your own personal environment around you. Use the following

“SKEPTIC” framework (**S**ocial, **K**/Career/Profession, **E**conomic/Environment, **P**olitical, **T**echnical, **I**ndustry/Competition, and **C**ustomer/Community) to look at environmental trends around you through the next five years.

Action: What are the three environmental trends – projections – opportunities – threats facing you over the life of your Strategic Life Plan for each letter of SKEPTIC?

Future Environmental Trends

Social: _____

K/Career/Profession: _____

Economic: _____

Environment: _____

Political: _____

Technical/Technology: _____

Industry/Competition: _____

Customer/Community/Service: _____

Action Hint: Reference the following chart of Occupations Projected to Grow the Fastest, then look again at your “K”/Career/Profession feedback.

Occupations Projected to Grow the Fastest – Through 2020

120%	Personal and Home Care Aides	75%	Occupational Therapists
100%	Home Health Aides	75%	Manicurists
90%	Systems Analysts	58%	Medical Assistants
88%	Computer Engineers	57%	Paralegals
83%	Physical Corrective Therapy Assistants/Aides	56%	Medical Records Technicians
83%	Electronic Pagination Systems Workers	55%	Special Education Teachers
82%	Occupational Therapy Assistants/Aides Attendants	55%	Amusement and Recreation
80%	Physical Therapists	53%	Correction Officers
78%	Residential Counselors	51%	Operations Research Analysts
78%	Human Services Workers	50%	Guards

Career Thinking

In today's world it is commonly believed that most adults will have anywhere from two to four different "careers/lives" rather than one. How many have you had already?

I. Pre-Career/Re-Training, Schooling Focus:

A. High School: _____

B. College: _____

C. Post College: _____

II. Careers: First Job(s)

A. First Full-time Career: _____

B. Second: _____

C. Third: _____

III. Current Career: _____

IV. Future Career (Ideas):

A. _____

B. _____

C. _____

Action Hint: Strategic Life Planning is definitely needed (at a minimum) each time you consider a career/life change.

Action: Based on all the preceding, what are the 5-10 most important, biggest, or “critical” issues facing you today as an individual?

Critical Issues List

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Hint: Keep this list in mind throughout this book (dog-ear this top right corner) so you can ensure your career and life planning deals with these key issues you have.

It is time for us as individuals, couples, and families to face up to reality. Our world is undergoing radical change, and so to must we.

The only limits, as always, are those of Vision”

“You see things; and you say “why?”

But I dream things that never were and I say,

“Why Not?”

– George Bernard Shaw

*“Optimism is the key to success,
especially in today’s world where “clinical depression”
is 30% higher now versus 20 years ago.”*

Honesty is job one!

To deal with radical changes in our lives and careers, we must be honest with ourselves. We must recognize that it is time to move into this transformation, as there is no resisting it. We need to think “revolution,” not “evolution.” Now is the time for new visions, new strategies, new skills, and new actions.

Our goal must be to achieve success in this new millennium; not just to “hold on” and to prevent failure in our lives and careers. Being proactive, planning for and taking charge of our lives is critical; more now than ever before. We will need more teamwork, greater self-initiative and much more empowerment in our lives, families and our organizations (but within a clear vision).

We need this clear direction, empowerment and its corresponding accountability for faster, smarter, more innovative and new and different actions. This is a tall order, to say the least. Using the Strategic Life Planning Model, and our Five Phase A-B-C-D-E systems approach, will increase your ability to clarify and simplify your career, life, and direction.

The environmental changes and strategic issues facing you **MUST** be dealt with. The only question is whether you will deal with them in a piecemeal, analytic, day-to-day problem-solving fashion alone, as most individuals, couples, and families do. Or, will you deal with them in a systematic, organized, and proactive fashion using Strategic Life Planning and Strategic Change Management?

A piecemeal, analytical approach to a systems problems no longer works.

On the other hand, the potential benefits of doing Strategic Life Planning through the use of our Systems Thinking model are great...a fulfilling life and career. Read on...

Benefits of Systems Thinking and Strategic Life Planning

“At the end of your life, you will never regret not having passed one more test, not winning one more verdict or not closing one more deal. You will regret time not spent with a husband, a friend, a child, or a parent.”

– Barbara Bush

Your Legacy to Future Generations

“Years ago, I trained with 30 other adults to become a lay teacher of the Old and New Testaments in my church. One evening, our minister invited a Jewish rabbi to talk to our class. The rabbi got onto the topic of the purpose of life - a rather esoteric subject. Most of us had fairly hazy views, if any, for our own selves. He pressed us by directly asking, “What’s the purpose of your life? Why are you here?”

The rabbi’s answer was that we are all to lead lives of purpose, and that purpose is to serve humanity, however we choose to do so. He urged us to begin efforts of enduring value. He pointed out that

making long-term investments for future generations, such as protecting the environment, was worth our time and effort. No one is going to remember you as an individual in four generations, but your descendants may well remember something that you began, something you nurtured for someone else to foster, especially if they are among those who experience the benefits of your labor.”

– *The Futurist*

Now that we’ve discussed these global changes and their implications for your life and career, what are the benefits of using our Strategic Life Planning Process? Some might include:

1. **A visionary process** whereby you can develop a vision of your future, your core values, and strategies. Thus, it enables you to align your personal and professional goals to the same end: serving others. This empowers you, focuses you, and makes decision-making easier.
2. **Developing focused outcomes**, a set of specific and quantifiable measures of success, year after year so you will be able to track your progress.
3. **Help your key stakeholders** support your future ideal vision. Remember, people support what they help create.
4. **Enable a proactive career adaptation** to our changing global world, and turbulent marketplace. This allows any person to improve their skills and competitive advantage(s) using a thorough analysis of their key strengths and weaknesses, environmental influences, and core strategies.
5. **Enable the planning team** (if a couple or family) to learn to function as a highly effective team in support of the Strategic Life Plan. This teamwork is key to reinforcement and successful implementation.
6. **An intensive developmental and strategic-orientation process** if you are doing this for the first time. Anyone who wants to live their life strategically and intentionally can do so.
7. **Enable focus and annual priority setting** in order to determine precision spending priorities during tough school, employment, career, life, and economic times.
8. **A new way of thinking at the macro-strategic level**, versus the micro-operational level alone. It enables you to live your day-to-day life and career connected to your longer-term vision.

Action: List the top 3-5 benefits you believe you will enjoy as a result of this effort.

Hint: Look back at your Critical Issues List for ideas.

1.

2.

3.

4.

5.

What Are Some Common Planning Mistakes?

"The greatest of faults...is to be conscious of none."

– Thomas Carlyle

Mistakes abound in Strategic Life Planning. Two of the most prevalent ones are:

1. Failure to start Strategic Life Planning by defining Phase A; the outputs or ends and
2. Failure to use the KISS philosophy (Keep It Simple Sam/Sara). Clarify and simplify!

Other typical mistakes include the following:

3. Failure to integrate life planning with annual action plans and follow-up status checks.
4. Keeping life and career planning separate from the day-day routines of life.
5. Developing Vision, Mission, and Values statements as fluff only...no follow-through.
6. Having yearly weekend retreats only, and calling it Strategic Life Planning.
7. Failing to design/complete an effective implementation/follow-up measurement process.
8. Violating the "people support what they help create" seemingly simple element.
9. Conducting "Life as usual" after Strategic Life Planning (SPOTS Syndrome).
10. Failing to make the "tough choices" on future directions and current obsolete routines/ruts.
11. Lacking a scoreboard; measuring what's easy, not what's important.
12. Having a scattershot approach to life and career planning - lack of focus.
13. Neglecting to benchmark yourself against the best competition in your career.
14. Not thinking you can be proactive in your life - just reacting to life as it comes along.
15. Not believing you can acquire the education and skills you need to get ahead.
16. Not all family members want to do this - or see the benefit in it.
17. There are likely to be underlying issues emerge that I do not want to face.

Action: Based on this list, what planning mistakes have you made in the past, and are likely to make in the future unless you follow the "Systems Approach"?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

What Other Choices Do We Have?

"Faith is the daring of the soul to go farther than it can see."

– William Newton Clark

Part III has focused on why all individuals, couples, and families need to do Strategic Life Planning in today's radically changing global environment. Having seen the environmental changes going on all around you and having listed the strategic issues facing you, what choice do you really have? All of these environmental changes are occurring and will continue to occur. **Your strategic issues will not go away.** Most of these kinds of issues grow larger, if ignored over time.

So, the real question is not 'if,' but 'how,' you are going to address these issues.

Are you going to be a victim and bemoan your fate, or are you going to take charge of your life and your career? If you believe that you need to take charge of your life and job, there are only two more questions and choices you have to answer.

#1. Is the timing right to continue on in this self-paced text?

Well, the time is never right. The reality is that *"time is just a reflection of our priorities."* (to quote Steve's mentor, Jerry Harvey.)

Action: Is planning one of your priorities? Are you committed to completing this book and your Strategic Life Plan? Yes _____ No _____

#2. Are you or your key stakeholders skeptical of the value of life and career planning?

If you are honest, you will probably be somewhat skeptical, even now. We know we are. That's how we got into planning; because we felt we could do it better than those "darn planners" who never seemed to get anything implemented. Since that time, however, we have learned that **"skeptics are our best friends."**

Skeptics are the ones (including those little voices inside you) that tell you the truth about what will work or not work in life planning and implementation. So, listen to the skeptics and problem-solve the issues they bring up. Those issues and barriers can be some very valuable keys to successful implementation.

Skeptics are invaluable to our last section in this Part III, "Plan-to-Plan." As you complete the actual tasks of your Plan-to-Plan, (Step #1 in Strategic Life Planning), they will keep you honest, ensuring any planning you do has a practical value and payoff. Hopefully, at this point, many of your reasons to be skeptical have been laid to rest by our thoughtful Systems Approach.

PLAN-TO-PLAN: The Educating and Organizing Step

"Every moment spent planning saves three to four in execution."

"When one door of happiness closes, another opens, but often we look so long at the closed door that we do not see the one which has been opened for us."

– Helen Keller

Strategic Life Planning is a process that is rarely done, and if it is attempted, it's frequently poorly accomplished. It is not due to any intent or incompetence on the part of individuals. It is often due to the lack of advance or pre-planning, which we call the "Plan-to-Plan" step. **This educating and organizing step is vital to success.** That is why we have spent so much time in this book **engineering success up-front** before getting into the actual development of your Strategic Life Planning documents.

Up to this point, we have covered the "Overview and Executive Briefing" portion of this Plan-to-Plan step.

"Review"

Three Goals in Strategic Life Planning:

- Goal #1: Developing a Strategic Life Plan and Document.
- Goal #2: Ensuring its successful implementation.
- Goal #3: Sustaining High Performance

Three Simple Premises behind Strategic Life Planning:

1. Planning is a Part of Life.
2. People Support what they help Create.
3. Systems Thinking: A Better Orientation to Life.

We also covered briefly the revolutionary and global changes going on all around us and why it is important to do Strategic Life Planning as **THE** primary way to change yourself and your spouse or family in an intelligent and systematic fashion.

We looked at the "Critical Issues" facing you and what the benefits of this systems approach are. We also looked at some common mistakes often made in the usual piecemeal approach to this systems problem.

Now it is time to complete a series of further Plan-to-Plan tasks to finish "Organizing" yourself and your planning team members prior to conducting the actual Strategic Life Planning in the next Part, Part IV of this book.

As you begin your Strategic Life Planning, are you clear on your own terminology?

Action Task #1: What terms are you planning to use for the A, B, C, D, E locator phases?

Phase A (Outputs) _____

Phase B (Feedback loop) _____

Phase C (the Input or Strategies to Act) _____

Phase D (Throughputs or Implementation) _____

Phase E (Environmental Scanning) _____

Action Task #2: There are numerous ways in which you can use this self-paced book to do Strategic Life Planning. Select one way you want to use this book from the following menu:

- _____ 1. An individual – career and life both*
- _____ 2. A couple – career and life both
- _____ 3. A family – career and life both
- _____ 4. A family – and a family run business (See Appendix for a sample).

***Action Hint:** Don't do your career only. Look at your whole life!

Now that you have chosen to use this book:

Action Task #3: Clearly list the names of the people (individuals, couple or family, etc.) you will be planning for: _____

Action Task #4: How far out into the future do you want to plan? (typically 3 years, 5 years, or until a certain age or event will occur):

Future Date: _____

The next step is to define who the key stakeholders are whom you should involve in your planning in some fashion. Stakeholders should be in the room on this planning team. The others you can involve in a more limited, "Parallel Involvement Process" fashion.

A "Stakeholder" is anyone who has a "stake" in the success or failure of your Strategic Life Plan.

They might include your family, circle of friends, a minister, Rabbi, or priest, family members, supervisor, colleagues. It may also include community members, other organizations, or agencies you partner or work closely with, as well as any clients you serve. All of these stakeholders could be part of your **larger Planning Community**, even if they are not part of the core **planning team** that does the hard work of document drafting.

Action Task #5: Identify your stakeholders here in a very specific way:

- | | |
|----------|-----------|
| 1. _____ | 9. _____ |
| 2. _____ | 10. _____ |
| 3. _____ | 11. _____ |
| 4. _____ | 12. _____ |
| 5. _____ | 13. _____ |
| 6. _____ | 14. _____ |
| 7. _____ | 15. _____ |
| 8. _____ | 16. _____ |

Action Task #6: Once you have identified your stakeholders, go back to your list, and circle the top 3-7 key ones that you want to involve in the planning. (If you are going to have a positive commitment for successful implementation later.)

The potential size of the planning team could be the **first "tough choice"** you have to make in planning. The rule of thumb for effective group dynamics is 6-8 people maximum. Obviously, for an individual or a couple, this number is too high and unnecessary. Strategic Life Planning is not about being nice to each other, but having the right people in the room, working on the right (difficult) issues.

In fact, our motto is "If things are going smoothly, we must be doing something wrong (unless we have unlimited resources)."

When choosing your core planning team members, consider including people with the following characteristics:

- a sense of clear direction
- ownership and commitment
- key players with data reality
- key people to help with successful implementation
- stakeholders you trust who have a broad perspective
- supportive people

Lastly, when choosing members to assist you, be sure they are willing to have your interests, perspective, and orientation. Status quo, narrow perspectives and interests, or representing only their interests must be left at the door.

Action Task #7: Now, list your Core Planning Team membership here:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. (maximum) _____

Action Hint: Procure a copy of this book for each team member and work the rest of this self-paced book together, if you have not already done so. It is often equally helpful for each member of the “Key Stakeholder” group to have one as well.

Action Hint: Any group (planning or otherwise) larger than 6-8 people probably needs a facilitator or trainer to help the group work effectively. In planning, even with less than 8 people, it is often more effective to have someone serve as a facilitator or trainer of the planning process. The facilitator serves as the coordinator, guide, and expert in the planning process and handles logistics/mechanics as well.

Action Hint: This life and career planning step should prove easier for individuals, couples and families as fewer people are usually involved. However, you still need to identify and involve key stakeholders to ensure you have someone play “devil’s advocate” with your plans. **You will probably not need a facilitator to assist you.** It may be that just having access to a Strategic Life Planning process expert throughout is all you need. On the other hand, if the issues or the personalities are difficult, then having someone facilitate the process may be key. Keep in mind the Strategic Life Planning motto that *“If things are going smoothly, we must be doing something wrong...unless we have unlimited resources.”*

For purposes of this book, we are effectively serving as the trainer, expert, and process facilitator, freeing you to work in a more independent fashion. This is one of the major advantages of a self-paced text like this one. However, if you are going to be planning with 6-8 people you will *definitely* need a facilitator.

Action Task #8: Decide on if and/or who is going to be your facilitator now:

No? _____ Yes? _____

Who: _____

The next task involving your planning team members is to be clear on how you will make decisions in this process. See the list below for the recommended consensus process.

Action Task #9: Determine if you are going to follow this consensus method or will you be using another decision-making method?

How Do We Make Decisions in this Process?

- Take the time we need.
- Do it as a team.
- Do it by consensus.
- "I will **actively support** the decision, even if it is not the exact decision I would personally make."
- Present all sides to an issue; full discussion but limit time.
- Test consensus (if anyone thinks there is one).
- Focus on the substance of the discussion; the spirit or intent.
- Our decision may be tentative (*a draft*) and subject to the validation/changes we make after consulting with our key stakeholders.
- Check at the end to keep our relationship in focus.

The key two words... "Actively Support."

Based upon your initial environmental scanning and strategic issues list, do you need to collect any further information, data or do any further specific scanning?

Action Task #10: Complete (or at least consider) the "Initial Scanning Required" task below:

Initial Environmental Scanning Required

Instructions: List any additional environmental scanning that should be conducted at the beginning of the Strategic Life Planning process.

What areas to be scanned/data collected	Who responsible?	When covered?

In addition to all the mistakes we listed previously, there are many potential barriers in the Strategic Life Planning process itself. Look at the list below:

Potential Barriers in the Strategic Life and Career Planning Process

1. Lack of belief and commitment to career or life planning, or at least to investigating Plan-to-Plan.
2. Group size too large or too small to include good dialogue.
3. Family doesn't believe in or reinforce career or life planning.
4. Time/resource commitment isn't there to plan for career or life; unrealistic expectations; too fast/rushed.
5. Day-to-day growth and pressures too dominant to do any planning.
6. Lack of willingness to be visionary, proactive, and creative.
7. Tough choices avoided; failure to set priorities and focus spending.
8. Reactive, low risk, rewards mentality; low reinforcement for strategic thinking.
9. Measuring success mentality is missing.
10. Past history and mistakes in previous career or life planning attempts.

11. Perseverance in completing the career or life planning process itself.
12. Frequently shifting priorities and focus; not persevering on one track; inconsistent decisions.
13. Managing the implementation and change/follow-up process.
14. Keeping up momentum in implementation (long term).
15. Low commitment to the final Vision of the Strategic Life Plan.
16. "SPLOTS" Syndrome – Strategic Plan for Life on Top Shelf; no formal implementation.
17. Failure to provide the needed resources (financial and personnel) to implement.
18. Poor information on the SKEPTIC environments (**S**ocial, **K**-Career, **E**conomic/Ecology, **P**olitical, **T**echnical, **I**ndustry, and **C**ustomer).
19. Conflicting directions/priorities among family members/couple.
20. Conflicts, politics, lack of interpersonal skills among family/couples when working together.

Readiness Steps and Actions (Barriers and Issues to the Process)

Action Task #11: Complete the Readiness Steps and Actions task below to ensure you have taken into consideration all the potential barriers to success:

A. What are the 3-5 most important readiness issues for me as an individual?

1. _____
2. _____
3. _____
4. _____
5. _____

B. What prework or other actions should I take to cope with them?

1. _____
2. _____
3. _____
4. _____
5. _____

Action Task #12: Complete the "Balance in Body, Mind, and Spirit" questionnaire on next page:

Balance in Body, Mind and Spirit

Instruction #1: Please answer each question on a 1-5 scale.



I. Body

- ___ 1. Do you have specific ways in which you regularly keep your stress levels under control?
- ___ 2. Do you practice a good time management system that includes a priority setting and effectiveness focus; not just on efficiencies?
- ___ 3. Do you get adequate restful sleep at night?
- ___ 4. Do you exercise regularly?
- ___ 5. Are you physically fit and "in-shape"?
- ___ 6. Is your health good overall?
- ___ 7. Do you eat properly and nutritionally?
- ___ 8. Do you take adequate lengthy (7+ days) vacations each year?
- ___ 9. Do you take adequate short breaks in your work life?
- ___ 10. Do you have trust and confidence in yourself to handle stress, emergencies and crises well?

Sub Total for "Body"

II. Mind

- ___ 11. Do you have and live a clear and personal purpose statement for your life?
- ___ 12. Do you have and follow a Strategic Life Plan for yourself with clear goals and objectives?
- ___ 13. Do you take quiet time regularly for yourself to meditate, relax deeply and clear your thoughts and stress?
- ___ 14. Are you constantly learning and growing?
- ___ 15. Do you have and pursue clear career goals?
- ___ 16. Do you have and pursue educational goals for yourself?
- ___ 17. Do you have adequate private time for yourself?
- ___ 18. Do you have and pursue hobbies and avocations outside of work?
- ___ 19. Are you a strategic, conceptual and systems thinker?
- ___ 20. Do you act with conscious intent?

Sub Total for "Mind"

Balance in Body, Mind and Spirit (*continued*)

III. Spirit

- _____ 21. Do you have and live a clear set of personal beliefs, values and/or philosophies?
- _____ 22. Is there a clear spiritual or religious component to your life?
- _____ 23. Are you rarely “out of control” emotionally and/or rarely have emotional outbursts?
- _____ 24. Do you have positive or upbeat personality?
- _____ 25. Do you have a strong sense of self worth and self esteem?
- _____ 26. Do you stop others from negatively impacting your dignity and respect as a human being?
- _____ 27. Do you recognize and take time to celebrate your life’s successes regularly?
- _____ 28. Are you in love with someone?
- _____ 29. Do you spend adequate time enjoying the beauty of nature?
- _____ 30. Do you have beauty around you in your daily life?

Sub Total for “Spirit”

Total Score

Determining Average Scores

Body/10	=	Average	=	
Mind/10	=	Average	=	
Spirit/10	=	Average	=	
Total/30	=	Average	=	

Note:

Maximum possible total score = 150 points
An average total score = 90 points

Instruction #2:

List your top 3-5 areas of excellence	List your top 3-5 areas needing most improvement
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Action Task #13: Now that you have completed all the educating and organizing tasks to engineering success up-front in Strategic Life Planning, **are you still committed personally to continuing?** Yes _____ No _____ Not Sure _____

If your answer is not sure (or is wavering), go back in Part III and review the benefits of doing this.

Action Task #14: If the benefits of Strategic Life Planning are still relevant, then let's begin creating your Ideal Future Vision now!

*You are Now Ready to Design, Build, and Sustain
Your Fulfilling Career and Life!*

Note: If you want to properly document your plan, we suggest you go to our online store at www.systemsthinking.press.com. You will find the Strategic Life Planning template to purchase.

We highly recommend this to ensure proper follow through and success.

PART IV
What Are the Five Basic A-B-C-D-E Phases
in Strategic Life (and Career) Planning?
“Create Your Own Future”

*“If you do not think about the future,
you cannot have one.”*

– John Galsworthy

*“The future belongs to those who
believe in their dreams.”*

– Eleanor Roosevelt

*“You can and should shape your own future;
because, if you don’t,
somebody else surely will!”*

– J. Barker

*“We need to learn how
to spend our time and effort
working on the future,
instead of continually rearranging
the past.”*

– Philip Crosby

Phase **A**: Creating Your Ideal Future

– The Place to Begin –

*"The only limits, as always,
are those of vision."*

– James Broughton

*"The purpose of human life is to serve,
to show compassion, and the will to help others."*

– Albert Schweitzer

Step #2: YOUR IDEAL FUTURE VISION is the place to begin your Strategic Life Planning. Again, begin at the end or desired outputs/outcomes; then, think and work backwards towards this ideal future. This step is concerned with formulating dreams that are worth believing in and fighting for. At this stage, in beginning the actual Strategic Life Planning process, the cry of "It can't be done!" is irrelevant. How to turn the vision into reality is the backwards thinking process pursued after the vision is created.

Three challenges are met during this step:

Challenge #1: To articulate Core Values for the future that will guide day-to-day behavior and collectively create your desired individuals, couples, or families culture.

Challenge #2: To conduct a visioning process in order to develop a **shared Vision Statement** of your dreams, hopes, and desired image of your future.

Challenge #3: To develop a **Mission Statement** for the future describing why you as individuals, couples or families exist.

Let's Begin with Challenge #1: Articulating CORE PERSONAL VALUES:

Core Personal Values guide our day-to-day behaviors, and collectively, create the desired person we want to be. Sometimes they are called our beliefs and philosophies. In any case, there can't be very many like this. Core Values are few in number. They usually meet the following criteria:

- A collective belief by all those involved (i.e., couples/families) you are a part of.
- They determine the "norms" or standards of acceptable behavior as to how to approach your life and career.
- They are enduring and consistent over time. They are one of the last things you would want to give up (even in difficult times).
- They are driven by, and crystallized from, the top leadership in the family.

Core Personal Values Exercise

Action Task #1: Complete the Core Personal Values Exercise Below:

Please rank these from 1 to 15, with 1 being the most important to you personally, and 15 the least.

	Actual	Desired
1. <i>Having good relationships with colleagues/family</i>	_____	_____
2. <i>Professional reputation/respect</i>	_____	_____
3. <i>Achievement of organization/family goals</i>	_____	_____
4. <i>Teamwork and collaboration</i>	_____	_____
5. <i>Leisure time for enjoyment/fun</i>	_____	_____
6. <i>Wealth and prosperity</i>	_____	_____
7. <i>Fitness and health</i>	_____	_____
8. <i>Contribution/service to society/community</i>	_____	_____
9. <i>Acknowledging/recognizing other's achievements</i>	_____	_____
10. <i>Autonomy/freedom to act</i>	_____	_____
11. <i>Personal growth</i>	_____	_____
12. <i>Time with family/close friends</i>	_____	_____
13. <i>Ethical behaviors</i>	_____	_____
14. <i>Excitement and challenge</i>	_____	_____
15. <i>Spiritual/religious time</i>	_____	_____

Action Task #2: Once you have finished both columns of the exercise yourself, share and compare your answers with your planning team and/or in a Parallel Involvement Process with key stakeholders.

Action Hint: The goal of this challenge is to develop clarity for your desired personal values (and a document to reflect them). To accomplish this, you will need to decide on a small number (3-6) of these core personal values. Then, you will need to develop a series of bullet statements under each core personal value in order to fully define and share them in a useful way.

Action Task #3: List your agreed upon core personal values and the key bullets in the space provided below:

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Once you have defined your personal values, you may also want to do a quick Current State Assessment of how you are doing vs. your values.

Action Task #4: Answer the following questions:

A. Which 2-3 personal values am I doing best at?

1. _____

2. _____

3. _____

B. Which 1-2 personal values are most in need of improvement?

1. _____
2. _____

Action Hint: Ask your family and/or key stakeholders this question and see if their answers agree.

Action Task #5 (Optional): If you are part of an organization, compare and contrast your answers above to those organizational values in action (not the words - the reality). What issues arise for you?

1. _____
2. _____
3. _____

Action Task #6: "TO-DO" Action List - for Personal Values Improvement:

What to Do?	By whom?	By When?
1.		
2.		
3.		
4.		
5.		

Family-owned business:

If you are running a family-owned business, you may also want to develop a set of organizational values (or "Guiding Principles") as well, and combine it with your personal values into one Values Document for your entire organization.

"Remember, character does matter.

Never forget that character is what you are when no one is looking."

– Representative J. C. Watts

Organizational Values Exercise

Action Task #7 (Optional): Complete the Organizational Values exercise below:

	Column #1 The Way It Is Now	Column #2 The Way I Think It Should Be
1. Long term strategic perspective	_____	_____
2. Energizing leadership	_____	_____
3. Innovation/risk taking	_____	_____
4. Teamwork/collaboration	_____	_____
5. Recognition of achievements	_____	_____
6. Wise use of resources	_____	_____
7. Quality work/products/services	_____	_____
8. Contribution to society	_____	_____
9. Continuous improvement	_____	_____
10. Safe and orderly environment	_____	_____
11. Positive organizational management	_____	_____
12. High staff productivity/performance	_____	_____
13. Customer service/sensitivity	_____	_____
14. Ethical and legal behavior	_____	_____
15. Stability/security	_____	_____
16. Profitability/cost conscious	_____	_____
17. Employee development/growth	_____	_____
18. Growth/size of organization	_____	_____
19. Openness/trust/positive confrontation	_____	_____
20. Respect/caring for individuals	_____	_____
21. Quality of work life	_____	_____
22. High staff satisfaction/morale	_____	_____
23. Decision making at lowest level	_____	_____
24. Employees involved prior to decisions	_____	_____
25. Employee self-initiative/freedom	_____	_____
26. Diversity and equal opportunity	_____	_____

Action Task #8 (Optional): Review this list with all planning team members and develop a consensus on your organizations "Guiding Principles." Fill in the page with your agreed upon principles and "bullets" under each in order to further explain them.

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Core Value: _____

-
-
-

Action Task #9 (Optional): Once you have developed a consensus around the first draft of your core values, you may also want to do a quick Current State Assessment of how you are reinforcing these core values. There are many uses of these values (see below).

Organizational Values Assessment and Uses for Family-Run Businesses

The following are typical categories where Values should appear and be reinforced within an organization. Where else should they appear and be reinforced in your organization?

1. Flow of orientation and assimilation versus sign-up
2. Job descriptions
3. Internal communication (vehicles/publications)
4. Press releases, external publications, brochures
5. Image nationwide (as seen by others)
6. Recruiting handbook; selection criteria
7. How applicants are treated (vs. values)
8. How "rewards for performance" operate (vs. values), especially non-financial rewards
9. Explicit corporate philosophy/values statement—visuals on walls/in rooms
10. Role of training/training programs (vs. values)
11. Corporate and product advertising
12. New customers and suppliers vs. current customer and supplier treatment and focus (vs. values)
13. Performance evaluation/appraisal forms (assess values adherence)/team rewards
14. New executive start-up
15. Policies and procedures (HR, Finance, Administrative, etc.)/day-to-day decisions
16. Cross-departmental events, flows, task forces
17. To whom and how promotions occur (values consequence assessed)/criteria
18. Executive leadership ("walk the talk"); ethical decisions; how we manage
19. Dealing with difficult times/issues (i.e., layoffs, reorganizations)
20. Strategy decisions—"how to do something"
21. Managing change
22. Organization and job design
23. Resource allocation
24. Operational tasks of quality and service
25. Stakeholder relationships

Where else in our organization?

Action Task #10: Examine this list and circle the 3-6 uses that you need to begin doing, or improve upon as an organization, individual, couple, or family.

Action Task #11 (Optional): Fill in the To Do Action List - for Organizational Values Improvement.

What to do?	By When?	By Whom?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		

Challenge #2: Developing a Shared FUTURE VISION STATEMENT:

Action Hint: This challenge is useful in developing a personal, or common and shared vision statement for the entity (individual, couple, or family) for which you are planning.

Action Task #1: Complete the Vision Tasks below. Some examples of your “current boundaries” or paradigms are listed to the left. These boundaries are listed to help you identify the limits of your current thinking.

When you brainstorm your ideal future, you should not be limited in your thinking.

Some Vision Boundaries Today

Examples of Current Boundaries	List Your Current Boundaries Today
1. Specifics at a future year, decade, etc.	
2. Our customers	
3. Our Personal Values	
4. Our skills and capabilities	
5. Our uniqueness, distinctive characteristics	
6. Our geographic location	
7. Our history, environment, family background	
8. Our race, ethnicity	
9. What I’m doing today	
10. Our level of leadership, excellence, service, quality, etc. today	
11. What we are known for; our reputation, image	
12. Our educational background	
13. Our friends, relatives, family relationships	
14. Our church, community service	
15. Our job and profession	
16. Our hobbies	
17.	
18.	
19.	
20.	

Now circle the current boundaries that may be limiting your thinking and let go of them for the next 15 minutes.

Action Task #2: Ideal Future Vision

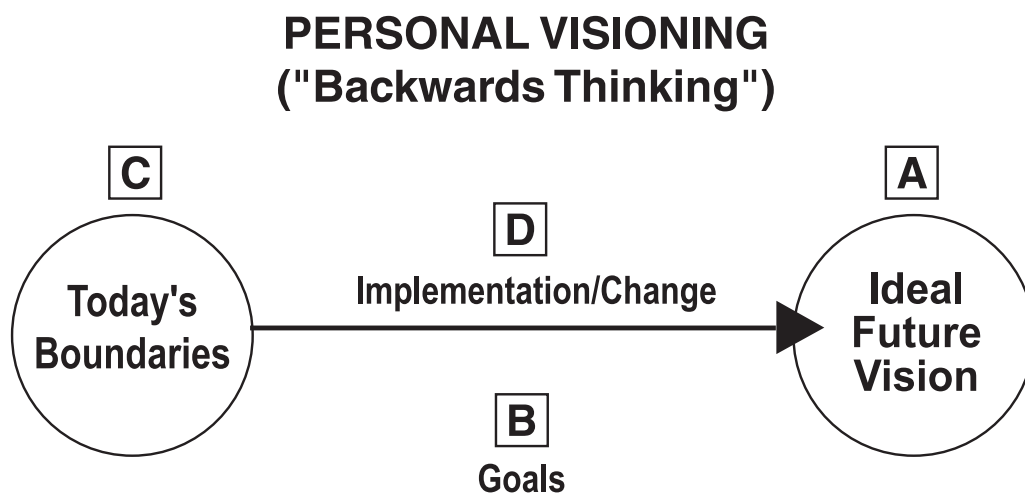
Find a relaxed position in your chair, put down your pen, and just focus on the Personal Visioning Exercise below. A Personal Vision is the best place to start in freeing up your mind to focus on the future. **Imagine your Personal Vision.**

Sharing your personal visioning is a key way to build trust and openness for the rest of the planning process. The downside is that it does take up precious time in today's fast-paced world. However, being clear with what each member wants out of life is crucial to the success of any Strategic Life Planning effort. Your investment of time will be worthwhile.

Action Hint: Of course, if you are doing this as a couple, it raises fundamental points of how you both see your desired future. For this reason, couples doing Strategic Life Planning should be aware of the risk that it poses. If you both have different visions of the future in mind, it could lead to serious differences. You must both be willing to be flexible.

Envision what the your ideal future vision could be like without limiting boundaries. Also, focus on your key visionary desires and concepts, not on the exact wording just yet. Perfectionism and boundaries limit your ability to create your ideal.

Be Creative – Be Innovative – Be Limitless – Go for Your Ideal!



My Future Vision for Myself at Year _____ is:

[illegible]

Action Task #3A: The goal of this challenge is to develop consensus around one vision statement. Often it is important to first list a set of bullet statements for each role in your life. Do that now using the space provided on the following pages:

Personal Vision Listed By Roles

Roles	Vision
I. Personal	
1. Physical Fitness:	
2. Health:	
3. Mental:	
4. Learning:	
5. Emotional:	
6. Spiritual:	

Personal Vision Listed by Roles (continued)

Roles	Vision
II. Interpersonal	
7. Social/Friends:	
8. Sense of Community:	
9. Service to Others:	
10. Home/Spouse:	
11. Immediate family/Children/Siblings:	
12. Extended Family (parents, grandparents, cousins):	

Personal Vision Listed by Roles (continued)

Roles	Vision
III. Career	
13. Careers/industry/roles: _____	_____
_____	_____
_____	_____
14. Work Relationships (Supervisors/Subordinates/Peers): _____	_____
_____	_____
_____	_____
15. Quality of Work Life: _____	_____
_____	_____
_____	_____
16. Organizational Culture/Values: _____	_____
_____	_____
_____	_____
17. Partnerships (Customers/Systems/Alliances): _____	_____
_____	_____
_____	_____
18. Education/Degrees: _____	_____
_____	_____
_____	_____
_____	_____

Personal Vision Listed By Roles (continued)

Roles	Vision
IV. Wealth	
19. Wealth/Accumulation:	
20. Wealth/Distribution:	
V. Lifestyle:	
21. Lifestyle balance:	
22. Experiences/Travel:	
23. Character/Reputation (Ethic):	
24. Avocation/Hobbies:	
25. Celebrations:	
26. Environment/Earth:	

Action Task #4: Using these bullets, develop a short, positive, and inspiring Vision Statement as your Draft #1 Vision document. Write your short, positive, and inspiring Vision Statement here:

Our Vision is:

(Draft #1)

[illegible]

"A Great Vision Has Three Qualities."

– Peter Block

1. It comes from the heart. A Vision is in some ways unreasonable.
2. We, alone, can make this statement.
3. It is radical and compelling. Our willingness to take a unique stand is what empowers us.

Action Task #5: Once you have brainstormed your ideal future Vision, then share it directly with the entire planning team and/or in a Parallel Involvement Process with your key stakeholders. Develop a draft #2 Consensus Vision.

Our Vision is
(Draft #2 Consensus)

“Creating the Vision”

– adapted from Peter Block

Tip #1: Forget about being number one.

Tip #2: Don't be practical.

Tip #3: Begin with who you serve in your life.

Tip #4: You can't treat those you serve any better than you treat each other.

Tip #5: If your Vision Statement sounds like motherhood and apple pie and is somewhat embarrassing, you are on the right track.

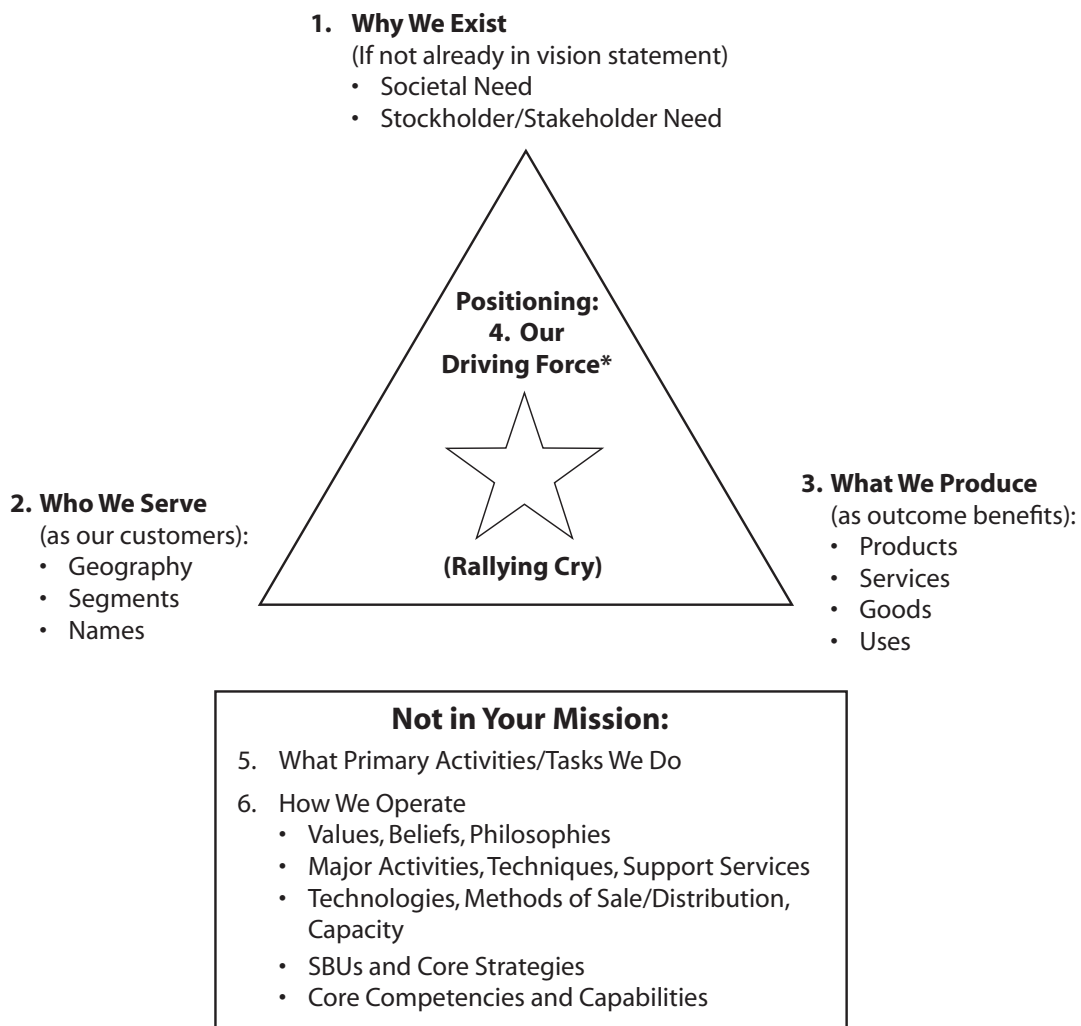
Keep in mind: *"The only limits, as always, are those of Vision!"*

Challenge #3: Developing a FUTURE MISSION STATEMENT:

As discussed, a Mission Statement answers why we exist, and what our purpose is. It tends to be **more realistic than a Vision Statement**. It answers three very specific questions in the following Mission Development Triangle.

Note: Contrary to some theorists, "How we operate" (Point 6 below) is NOT part of a Mission Statement. It is noted here for contrast only, to highlight what a mission is not.

Mission Development Triangle Exercise



***Note:** Your Driving Force/Positioning can be either a who, a what, a why, or a how, but it must position you in the marketplace differently from your competitors.

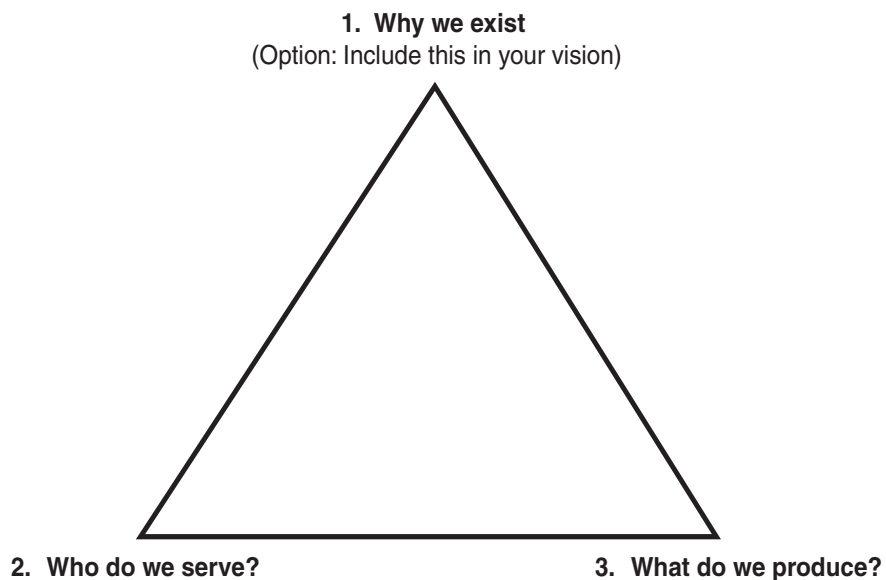
Action Task #1: Individually, complete the Mission Development Exercise below, as per the instructions.

Action Hint: Answer the questions quickly. Don't worry about getting the perfect words yet. Just get down on paper your key concepts. And note that Point 1 of the Mission Triangle – "why we exist" – links back to your Vision Statement.

Use the Triangle Model on the previous page as a worksheet.

Mission Development Triangle Exercise

Instructions: Please answer the first three questions below for the way we want to be in the future at year _____ (end of planning horizon).



Action Task #2: Once you have developed your own mission ideas, meet with your planning team and/or with key stakeholders and agree upon these 3 key questions: "Why you exist, Whom you serve, and What you produce."

Use the Mission back-up worksheet on the next page.

Action Hint: You should now have the key words agreed to, in addition to the concepts.

Action Hint: Some of the questions you may want to ask yourself about your life's mission might include

1. What are your unique gifts and talents (we all have them)?
2. How do you want to share these unique gifts and talents?
3. Why were you put here on earth?
4. How do you specifically contribute to society?
5. How do you make a difference in this world?
6. How would the world be poorer if you were not here?
7. Being selfish is okay - it is necessary but not sufficient for your mission.
8. Which of your roles in your Vision are most important to you?

Mission Agreement (Back-Up Pages)

<p>WHOM? _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>WHAT? _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>WHY? _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

At this stage, your Mission back up support page will become similar to your Vision back-up bullets. It will be used to develop your formal Mission Statement Document next.

Action Hint: A final Mission Statement Document should be:

- realistic and feasible; understandable, brief and concise.
- broad and continuing in nature, but not too broad as to be meaningless.
- stated in output (results) terms rather than activities (inputs or throughputs).
- each word specific and purposeful; especially the names of your customers, (whom you serve), your products, services, and talents.

However, please don't use the word "customer" to define your customer/society!

Action Hint: In developing a Mission Statement for yourself and/or a couple or family, you will be forced to look outside of yourself in terms of whom you are serving and why you were put here on this planet. For those of you with a spiritual background, it may put you in touch with your sense of service and spirit; a wonderful opportunity.

Action Task #3: Write your Mission Statement. Use the criteria on the previous page, while keeping our Mission Development Triangle Points 1-2-3 in mind.

For example:

Our Mission is to serve _____ (customers/society) with the
_____ (products and services) in
order to achieve _____ (why we exist).

My/Our Mission is:

Mission Statement Check...to ensure a Clear Customer/Society-Focus:

Earlier, we emphasized the need for a clear customer definition. A major purpose in life should be to serve someone else. Without such a purpose, the world would be in even more chaos than it is now, everyone selfishly pursuing his/her own ego needs. **Instead, our only true purpose is some form of customer/society satisfaction.** It is ultimately self-defeating to pursue self-aggrandizement, focusing solely on self rather than serving others.

An old cliché is **“What goes around, comes around.”** The reason this is an old cliché; is because there is a lot of truth to it! Often, in the press of life and the stress of our personal lives, this fundamental truth is forgotten. We lose our sense of service and customer/society-focus!

Another key concept is often lost in teams, departments and individuals, couples or families as well. We lose sight of the fact that **“My job is to serve the customer/society, or to serve someone else who does.”** Particularly for support teams and departments such as Human Resources, Finance, and Legal, members may sometimes resent their perceived role as second-class citizens.

The point is not that other individuals, couples, or families are any better than the support teams, but that other individuals, couples, or families are their customers! The support team or department’s job

is to serve other employees. They, in turn, can then serve the only true customer/society, the one who buys your products and services.

Finally, in order to fully appreciate this customer/society-focus concept, we have developed the **“Ten Commandments of Customer/Society-Focused Individuals, couples or families,”** You can use it to determine for yourself whether or not you really are Customer/Society-Focused. Do you give lip service to this core customer/society concept, or do you take it seriously?

Action Task #4: Read the following “Ten Commandments” and decide for yourself on a 1-10 scale (1 as low) your current state of being Customer/Society-Focused. Use this to be honest with where you stand today, and what kind of future challenge awaits you in this area. Gain consensus on this **Current State Assessment** as you did with each previous exercise.

Ten Commandments of Customer/Society-Focused Individuals, Couples, or Families

1. Are “close to the customer” (i.e., see, touch, feel, meet and dialogue with them face-to-face on a regular basis). Include the customers in their decisions, focus groups, meetings, planning, and deliberations.
2. Know the customers’ needs, wants, and desires – continually, as they change – and **surpassing them** is the driving force.
3. Survey the customers’ satisfaction with our talents and gifts on a regular basis.
4. Focus on the “valued-added” benefits to the customer (**Q**uality and service, **E**nvironmentally sound, **C**ost, Response and speed, **C**hoice – as well as performance, safety and other intangibles).
5. Are based on customer input and focus groups, set quality customer-service standards – expectations that are specific and measurable.
6. Require everyone to experience **moments of truth** by meeting and serving the customer directly...and on a regular basis.
7. Focus and change what you do based upon the customer needs and perceptions...and do it regularly.
8. Focus your thinking based on serving the customer.
9. Reward yourself and each other for customer-focused behaviors (especially families and couples that work together to serve the customer)...and the heavy use of **recovery strategies** to surpass customer expectations.
10. Become “customer friendly” people in all you do.

*“My life belongs to the whole community, and as long as I live
it is my privilege to do for it whatever I can.”*

– George Bernard Shaw

PHASE B: Measuring Success:**– Ten or Less Outcomes/Goals –**

*“Goal setting and careful goal selection
is the #1 criteria for success in all the literature.”*

STEP #3: GOALS are the quantifiable outcome measurements of success in achieving your vision, mission, and core values on a year-by-year basis. Some people call these your “Life Success Factors.” Call it what you are comfortable with, as long as you realize they are the **quantifiable outcome measures of success**. This step is needed by everyone doing Strategic Life Planning. It is necessary to ensure tracking of the continual improvement toward achieving your Ideal Future Vision. Setting Goals encourages concrete answers to three critical questions during implementation:

- #1. How do you know when you’re being successful?
- #2. How do you know when you’re getting into trouble?
- #3. If off course, what corrective actions should you take?

In developing your Goals, **first you need to define the Areas to be measured** from the key phrases within the Ideal Future Vision.

Action Hint: As a minimum, there are two specific Areas to be measured and tracked.

- 1. Customer/Society satisfaction
- 2. Financial results

Action Task #1: What are the key phrases from your vision, mission, and core values that define success for you?

Action Hint: Don’t forget to look at your Vision and Mission Back up detail for specific measures of success.

Action Hint: You may find that your Goals are a mixture of personal and professional outcomes. In fact, the different roles we generally play in life are listed in the Personal Visioning Exercise. They may prove useful as hints to your outcome measures of success as well.

GOALS

1. Your Initial Goal/Outcome Phrases:

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

1A. Finalize the Goal "Areas" to be measured:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
10. _____

Once measurement "Areas" are defined from your key phrases, specific measurements, and yearly targets should be set. Ten is the maximum preferred number of measures, forcing a focus on what's really "key" to success. **Lack of focus is a major problem in almost all Strategic Life Planning.**

Goals should always measure what's really important (not just what's easy to measure). They must include, as a minimum we stated earlier, the customer satisfaction area. Typical customer/society satisfaction areas might include product/service quality, customer service, cost and value, speed, delivery and response time as well as being environmentally responsive.

*"In the absence of clearly defined targets, we are forced to concentrate on activities and efforts...
and we ultimately become enslaved by them."*

Thus, it is crucial to this step that you understand the different and innovative ways you can measure almost anything.

Thus, **Goals must be specific and quantifiable measures** (in one of four different ways):

1. Quality – as perceived by the customer (surveys?)
 - internally (as per specifications)
2. Quantity – numbers (#)
 - ratios
 - specific existence or non-existence of a program or “x”
3. Time
 - 3 times a year
 - by a specific year or month (i.e., January 1998)
4. Cost – dollars (\$)
 - percents (%) or ratios

These measures should be ones for which you can physically see the status of; so you know objectively whether or not they have been achieved.

Now that you’ve gotten the picture on how and what is important to measure for your plan, **let’s work on building your complete set Goals measures in order to track plan achievement.**

Action Hints: If your planning horizon year is not far enough out into the future to actually achieve your Ideal Vision outcome, then consider using an “Ultimate Target” column as well. It helps keep your eye on your Ideal. You may also find you have too many Goals Areas to be measured, or just a comprehensive list of activities you are measuring. **Go back and prioritize.** Eliminate overlapping factors, or ones where they are only the means to another outcome factor.

Focus on the vital few key outputs, not the trivial many activities.

The operative word is key, not comprehensive, Goals.

Action Task #2: For each Area that defines success, you need to set a measurable outcome target or success measure for the final year in your planning horizon. This should be a realistic, stretch target that you are deeply committed to achieving (**a Monomaniac with a mission to achieve these**).

Action Task #3: Once you have developed these factors and targets for your final planning horizon year, it is time to develop your Baseline Target data for the current year.

Action Hint: Often the data is missing, or does not exist for other than financial measures. This is normal. It is due to the fact that we are asking you to measure what is important as outcome measures of your success; not what’s easy to count. In some cases, success in the first baseline year is just two tasks; (1) setting in place the measurement system and (2) determining the success targets for the final year.

Note: When completed, this Matrix is nothing more than a **report card of success**. It is similar to the report card you receive in school.

Action Task #4: Lastly, you need to set in place a measuring, tracking, and reporting system for these Goals on a regular basis. This tracking and reporting is the same as what we do with monthly household budgets and checkbook reviews.

GOAL AREAS	GOAL TARGETS BY YEAR _____?
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.

The only difference is that we are measuring, tracking and comparing “Plan vs. Actual” results of all the Goals in our ideal future vision; not just finances alone. See attached Continuous Improvement Matrix for format.

*Thus, “Financial measures and viability alone are necessary,
but not sufficient, for success.”*

Goal Area	Baseline Year Data	Planning Horizon Year Target Goal
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

A Final Word on Goals:

They are pretty easy to describe and discuss.
However, they are extremely difficult to develop in a quality way.
Be sure to keep working at fine tuning your measures.
At the same time, don't stop here in your planning. Keep moving on.

"Great are they who see that the spiritual is stronger than any material force."

– Ralph Waldo Emerson

Yearly Reporting Form (Target vs. Actual)

Overall Coordinator is [Name of KPSP Coordinator]

[illegible]

PHASE **C**: Developing and Converting Strategies to Actions

*"People are successful, not because of the hundred and one good little actions
they take to save money on paper clips and telephone calls,
but because of one or two major strategies that are brilliant!"*

– Adapted from Dr. Michael J. Kami

This Phase C of the Strategic Life Planning Model takes stock of current conditions and status of your functioning today. Core strategies are then established to close the gap between the Vision and today, along with a set of priority actions for the next 12 months. These core strategies become the organizing framework to guide the rest of the planning process; from the strategic to the annual action plans and follow-up progress reports.

Step #4: CURRENT STATE ASSESSMENT is the first step to complete in Phase C. The operative concept here is: **Honesty is job #1, folks!**

SWOT – An Executive Summary

While there are many ways to conduct personal or family assessments, the SWOT concept is the most clear and simple way to do so. In cases where numerous assessments are conducted, as here, the SWOT is also used as an Executive Summary. It is where both internal and external analyses (**S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats – SWOTs) are conducted. Then, the gaps between this SWOT analysis and your Vision are examined for strategic and action implications.

We will use all the following surveys and integrate your answers at the end of this Step #4 into a full SWOT.

Action Task #1: Complete the following three questionnaires:

#1: Acting with Conscious Intent

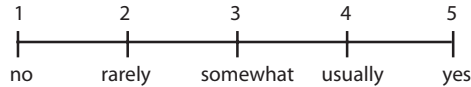
#2: Integrity and Character

#3: Do You Really Care About Others

Follow the instructions on each and make note of those areas with excellence and those needing improvement.

Acting With “Conscious Intent”

Instruction #1: Please answer each question on a 1-5 scale. Which are you/do you use?



I. Feelings Awareness

1. Do I have the ability to observe myself in action?
2. Do I use my emotions productively? (Being “in control” of my behavior)
3. Am I aware of others around me and their behaviors/feelings?
4. Am I “in touch” with my present feelings as they occur?
5. Do I express and “own” my current feelings; am I willing to risk sharing them?

Sub Total for “Feelings Awareness”

II. Being Open

6. Do I self-disclose to others about my behaviors/intentions?
7. Do I give and receive feedback constructively?
8. Am I open, honest and direct when communicating with others?
9. Am I appreciative and generous with praise and recognition of others?
10. Do I avoid getting defensive?

Sub Total for “Being Open”

III. Accepting Responsibility

11. Do I accept responsibility and accountability for my actions?
12. Do I say, “I’m sorry” and apologize when appropriate?
13. Is there congruence between what I say and what I do?
14. Am I flexible and adaptable to changes?
15. Am I willing to share participation in leadership functions?

Sub Total for “Accepting Responsibility”

IV. Being Purposeful

16. Do I act in the way I desire?
17. Do I have a conscious reason for each of my actions?
18. Do I act consistently; am I genuine and predictable?
19. Do I focus on clear goals or purposes in any situation?
20. Do I have the wisdom to know what’s important to respond to and what to “let go” of?

Sub Total for “Being Purposeful”

Acting with “Conscious Intent” (continued)

V. Handling Differences

- _____ 21. Do I avoid getting in “win/lose,” “either/or” games with others?
 _____ 22. Am I accepting of minority views that disagree with me?
 _____ 23. Am I aware and respectful of my interdependency with others on issues/problems?
 _____ 24. Am I able to ask honest, open-ended questions of others?
 _____ 25. Am I able to actively listen to others’ opinions?

Sub Total for “Handling Differences”

Total Score

Determining Average Scores

_____	Feelings Awareness /5	=	Average =	_____
_____	Being Open /5	=	Average =	_____
_____	Accepting Responsibility /5	=	Average =	_____
_____	Being Purposeful /5	=	Average =	_____
_____	Handling Differences /5	=	Average =	_____
_____	Total /25	=	Average =	_____

Note:

Maximum possible total score = 125 points

An average total score = 75 points

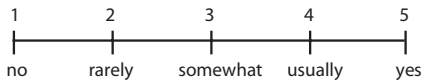
Instruction #2:

List your top 3-5 areas of excellence	List your top 3-5 areas needing most improvement
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Integrity and Character

(Best Practices Research Compilation)

Instruction #1: Please answer each question on a 1-5 scale. Which are you/do you use?



I. Respect Everyone

- _____ 1. Are you courteous and polite?
- _____ 2. Do you judge all people on their merits?
- _____ 3. Are you tolerant, appreciative and accepting of individual differences vs. questioning their motives?
- _____ 4. Do you ensure you don't intentionally demean or mistreat anyone or take advantage, manipulate, use or exploit others?
- _____ 5. Do you respect the right of individuals to make decisions about their own lives?

_____ ***Sub Total for "Respect Everyone"***

II. Be Responsible

- _____ 6. Do you think before you act and consider the possible consequences on all people affected by your actions?
- _____ 7. Are you willing to be accountable for your actions and accept the results, including possibly suffering the consequences?
- _____ 8. Are you willing to be committed to actions, and be reliable and dependable in their achievement?
- _____ 9. Do you set a good example for others, and are you known as a person who "walks their talk?"
- _____ 10. Do you ensure you don't blame others for your mistakes, take credit for others' achievements or more than your fair share?

_____ ***Sub Total for "Be Responsible"***

III. Pursue Excellence

- _____ 11. Do you always do your best with what you have?
- _____ 12. Are you persistent; not quitting or giving up, or just "trying"?
- _____ 13. Do you have a strong work ethic; being diligent and industrious at all times?
- _____ 14. Do you know and utilize your "special talents and gifts" to their fullest potential?
- _____ 15. Do you enhance the self-esteem of all others you deal with each day as you pursue your own excellence?

_____ ***Sub Total for "Pursue Excellence"***

IV. Be Trustworthy

- _____ 16. Do you tell the truth at all times and are you honest with everyone with whom you come in contact?
- _____ 17. Do you ensure you never betray a trust, deceive, mislead, be devious or tricky or withhold important information in relationships of trust?
- _____ 18. Do you never steal, cheat or defraud others?
- _____ 19. Do you keep your word and honor your commitments? Is your word your bond?
- _____ 20. Do you pay your debts (financial or otherwise) and return what you borrow?

_____ ***Sub Total for "Be Trustworthy"***

continued

Integrity and Character (*continued*)

(Best Practices Research Compilation)

V. Have Courage

- _____ 21. Are you clear on what is right and what is wrong?
- _____ 22. Do you stand up for your beliefs about what is right and wrong?
- _____ 23. Do you resist social pressures to do things you think are wrong?
- _____ 24. Do you show courage and self-discipline when times are tough?
- _____ 25. Do you have a reputation as a beacon of personal integrity?

Sub Total for "Have Courage"

VI. Show Caring and Kindness

- _____ 26. Do you show that you care about others in specific and explicit ways?
- _____ 27. Are you generous and share with others, even when they cannot "help" you (i.e., random and senseless acts of kindness)?
- _____ 28. Do you live by the *Golden Rule* of "do unto others as they would do unto you?"
- _____ 29. Do you also live by the *Platinum Rule* of treating people as they want to be treated?
- _____ 30. Do you ensure that you are not selfish, mean, cruel or insensitive to the feelings of others?

Sub Total for "Show Caring and Kindness"

VII. Provide Justice With Fairness

- _____ 31. Do you treat all people evenly, consistently, and fairly; even when making the tough decisions?
- _____ 32. Are you open-minded and actively listen to others and try to understand what they are saying AND feeling?
- _____ 33. Do you involve others in decisions that affect them prior to making the final decision?
- _____ 34. Do you ensure that you don't take unfair advantage of others' mistakes?
- _____ 35. Are you consistent in your dealings with others, or do they have to watch your moods?

Sub Total for "Provide Justice With Fairness"

VIII. Practice Citizenship

- _____ 36. Do you play by the rules and obey the laws?
- _____ 37. Do you follow the spirit of the law; not just the letter of the law?
- _____ 38. Do you respect authority (even if you may not fully respect the person)?
- _____ 39. Can you dialogue, discuss and learn about important issues of the day with others when not in total agreement with them?
- _____ 40. Do you stay informed on the issues and vote each election?

Sub Total for "Practice Citizenship"

IX. Have a Sense of Community

- _____ 41. Do you protect the environment and conserve our natural resources?
- _____ 42. Do you volunteer your service to assist in your community?
- _____ 43. Do you protect your family, organization and community?
- _____ 44. Are you charitable and altruistic?
- _____ 45. Do you support your community when the chips are down?

Sub Total for "Have a Sense of Community"

Integrity and Character *(continued)*
(Best Practices Research Compilation)

X. Ask the Ultimate Question

- _____ 46. And ultimately, when confronted with moral issues, do you ask yourself this question and answer “yes” to it: “Would I be proud to tell my parents and family what I did today?”

Determining Average Scores			
_____	Respect Everyone/5	=	Average = _____
_____	Be Responsible/5	=	Average = _____
_____	Pursue Excellence/5	=	Average = _____
_____	Be Trustworthy/5	=	Average = _____
_____	Have Courage/5	=	Average = _____
_____	Show Caring & Kindness/5	=	Average = _____
_____	Provide Justice With Fairness/5	=	Average = _____
_____	Practice Citizenship/5	=	Average = _____
_____	Have a Sense of Community/5	=	Average = _____
_____	Ask the Ultimate Question	=	Average = _____
_____	Total/46	=	Average = _____

Note: Maximum total score = 230 points
An average total score = 138

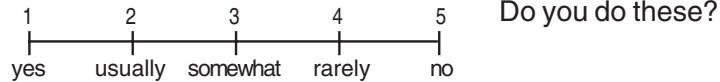
Instruction #2:

List your top 3-5 areas of excellence	List your top 3-5 areas needing most improvement
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Do You Really Care About Others?

(Worst Practices Research Compilation)

Instruction #1: Please answer each question on a 1-5 scale, with 1 being yes to these negative behaviors and 5 being no.



I. Negative Communications

- _____ 1. *Generalizing*—and using “always” and “never” or a trend of one incident vs. pointing out specific examples of failings in performance?
- _____ 2. *Public Criticism*—in front of others vs. *praise in public and criticize in private*?
- _____ 3. *A Critical Spirit*—who always looks for what is wrong or who to blame vs. reinforcing positive progress?
- _____ 4. *Lack of Promoting Teamwork*—and even causing disruptive competition and pitting people against each other vs. building an effective and cooperative team?
- _____ 5. *Poor Communications*—or communicating only on a “need to know” basis vs. dialogue and communicating regularly, including communicating on the big picture?

Sub Total for “Negative Communications”

II. Abusive Communications

- _____ 6. *Personal Attacks*—and ridiculing their personality, appearance or age vs. critiquing their work?
- _____ 7. *Intimidation*—and using your power vs. encouraging dialogue about the problem?
- _____ 8. *Obscenities*—and swear words vs. rational dialogue?
- _____ 9. *Bitterness*—and cynicism or snide remarks vs. holding your tongue?
- _____ 10. *Abuse and Harassment*—of others based on their sex, race ethnicity vs. treating them with the respect each of us deserve regardless of position?

Sub Total for “Abusive Communications”

III. Errors of Omission

- _____ 11. *Neglect*—and ignoring others' existence or presence through lack of acknowledgment, making them wait unreasonably or frequently vs. being supportive and sensitive to their needs.
- _____ 12. *Surprises on Performance Appraisals*—based on the “recency effect” or singular issues vs. yearlong performance, regular and periodic reviews, coaching and correcting?
- _____ 13. *Lack of Resources*—and piling on work without concern for priorities or reasonableness?
- _____ 14. *Lack of Adequate Training*—using the “sink or swim” method vs. assisting people with their learning curve?
- _____ 15. *Absentee Boss*—who is traveling, rarely there or available vs. being accessible when you are needed?

Sub Total for “Errors of Omission”

Do You Really Care About Others? *(continued)*

(Worst Practices Research Compilation)

IV. Lack of Integrity

16. *Lying* - and selective hearing/slanting the truth on stories to make your point vs. using only real issues?
17. *Dishonesty* - and misleading others about their performance or issues that impact them vs. directness?
18. *Favoritism* - or one employee over another vs. fairness regardless of performance?
19. *Withholding Earned or Promised Compensation* - and breaking of promises made vs. honoring both the spirit and letter of your word?
20. *Failing to Back Up Others* - when you know they are right vs. being consistent and having integrity?

Sub Total for "Lack of Integrity"

V. Self - Centered

21. *Selfishness* - and thinking only of yourself and your priorities: i.e., being a "taker" vs. a "giver"?
22. *Prideful* - and being so protective of being right that you can't apologize or be naive?
23. *Fear* - and defensiveness about others' ideas, or a Not Invented Here (NIH) view vs. a continuous improvement attitude?
24. *Insensitivity* - to others' feelings, moods or difficult issues in their lives or work vs. flexing your style to the situation?
25. *Depersonalization* - of the workplace and being "all business" vs. acknowledging others as fellow human beings with ideas, feelings and emotions?

Sub Total for "Self - Centered"

Determining Average Scores

_____	Negative Communication/5	=	Average	=	_____
_____	Abusive Communications /5	=	Average	=	_____
_____	Error of Omission/5	=	Average	=	_____
_____	Lack of Integrity /5	=	Average	=	_____
_____	Self - Centered /5	=	Average	=	_____
_____	Total /25	=	Average	=	_____

Note:

Maximum total score = 125 points

An average total score = 75 points

Instruction #2:

List your top 3-5 areas of excellence	List your top 3-5 areas needing most improvement
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Action Task #2: Complete the Personal Assessment Survey below, on a 1 to 10 scale. Assess yourself versus both (1) your past, and (2) your future competition for jobs/careers:

Career Personal Assessment Survey

Characteristic	Your Past	Future Job Competition
1. Values/Character		
2. Personal Life Goals/Mission		
3. Education/Knowledge		
4. Skills/Competencies		
5. Willingness/ "Can Do" Attitude		
6. Self-Change/ Adaptability Skills		
7. Physical Fitness		
8. Emotional Fitness		
9. Spiritual/Moral Fitness		
10. Habits		
11. Conclusions: Areas of Strengths:		
12. Conclusions: Areas of Weakness:		

Action Hint: Refer to your above answers when you fill out the SWOT exercise that will follow at the end of this Phase C. Step #4.

The SCANS Report: Preparing Students for Their Future

– Margaret Riel

Working backwards from the end point is one of the problem-solving strategies that students learn in school. Recently the Department of Labor has applied this strategy to the problem of redesigning our schools. They turned to industry and business and asked them: “What does work require of schools?”

Lynne Martin, former Secretary of Labor, formed the Secretary's Commission on Achieving Necessary Skills (SCANS) to find the answer to this question.

Three foundational skills and five competencies were identified by the SCANS commission.

The Three SCANS Foundational Skills

- #1 *Basic Skill Development*: Reading, writing, arithmetic, mathematics, speaking and listening.
- #2 *Thinking Skills*: Thinking creatively making decisions, solving problems, visualizing, learning how to learn and reason.
- #3 *Personal Qualities*: Individual responsibility, self-esteem, sociability, self management, and integrity.

The Five SCANS Competencies

- #1 *Resources*: Allocating time, money, materials, space, and staff.
- #2 *Interpersonal Skills*: Working on teams, teaching others, serving customers, leading, negotiating, and working well with people from culturally diverse backgrounds.
- #3 *Information Handling Skills*: Acquiring and evaluating data, organizing and maintaining files, interpreting and communicating, and computer processing of information.
- #4 *Systems*: Understanding social, organizational and technological systems, monitoring performance, and designing and improving systems.
- #5 *Technology*: Selecting appropriate technology, applying the most effective tools for the task, and using good troubleshooting skills.

Source: *T.I.E. News*, Volume 5, Number 1

Action Task #3: Complete the Skills and Competencies Assessment below to determine your abilities in these key areas. Please answer each question on a 1-10 scale, with 1 representing low, 5 average and 10 high abilities in these key areas.

SCANS: Personal Skills and Competencies Assessment

3 Foundational Skills	Your Score	Rationale
1. Basic Skill Development		
2. Thinking Skills		
3. Personal Qualities		
5 SCANS Competencies	Your Score	Rationale
1. Resources		
2. Interpersonal Skills		
3. Information Handling Skills		
4. Systems		
5. Technology		
11. Conclusions: Areas of Strengths:		
12. Conclusions: Areas of Weakness:		

Action Hint: Refer to your above answers when you fill out the SWOT exercise that will follow at the end of this Phase C, Step #4.

Action Task #4: Complete the Career Self Development Assessment below to determine what activities you may want to engage in to better help you in your professional growth:

Career Self Development

Development Activities	Do I Engage In Them? Yes or No?	Comments
1. Regularly use a resource library or the Internet to check out books, reference materials, etc.		
2. Buy and read books		
3. Subscribe to newspaper, newsletters, magazines, executive book summaries		
4. Belong to and attend professional associations		
5. Engage in networking activities: bag lunches, after work meetings, breakfast meetings, buddy/gal systems		
6. Undergo personal skills and personality assessments		
7. Hold weekly, monthly, quarterly review meetings or mini-meetings with key stakeholders/family members		
8. Attend trade shows or other events within the past year		
9. What else?		

Conclusions: _____

Areas of Strength: _____

Areas of Weakness: _____

(Optional) Action Task #5: Becoming a Strategic Partner:

Please rate yourself on the following items.

Use the following scale: 1 (low), 2 (average), 3 (high).

1. _____ Knowing my organization's business really well.
2. _____ Applying Systems Thinking to managing complexity in your organization.
3. _____ Being seen as having integrity and ethics.
4. _____ Anticipating and responding appropriately to pressures for organizational change.
5. _____ Knowing line managers' goals.
6. _____ Knowing your organization's strategic plans and taking a broader "corporate view".
7. _____ Understanding strategic plans.
8. _____ Understanding the strategic change process (how people to through change).
9. _____ Simplifying complex ideas so that those not in your function can understand and use them.
10. _____ Thinking strategically.
11. _____ Being candid.
12. _____ Being a sound board for others.
13. _____ Being available.
14. _____ Managing upward.
15. _____ Developing confidences.
16. _____ Working behind the scenes.
17. _____ Sharing the bad news.
18. _____ Confronting effectively when needed.
19. _____ Being loyal to the organization.
20. _____ Being perceived as capable by senior management people.
- _____ = Total (possible 60 points)

Question: Where do I need to improve? (Circle it above)

(Optional) Action Task #6: How to Work With Others

Which of these am I good at? Please rate yourself on the following items. Use the following scale:
1 (low), 2 (average), 3 (high).

- _____ 1. Focus on their needs; timing
 - not mine
 - low ego
- _____ 2. Give options vs. "telling them"
 - Valid Information
 - Informed Choice
 - Internal Commitment
- _____ 3. Model openness, disclosure first; build intimacy
- _____ 4. Clear contracting; know what to expect; "no surprises"
- _____ 5. "Talk their talk" - ROI, business, industry
- _____ 6. Truly care for them; personal relationship; build total confidence (AGE):
 - Acceptance
 - Genuineness
 - Empathy
- _____ 7. Use "thank you" cards
 - Recognition
 - Reinforce positives (not negatives)
- _____ 8. Educate them by osmosis; mini lecturettes; models; vignettes
- _____ 9. Share a Systems Model: fit; integration of parts
- _____ 10. Appreciate their web of relationships and complexities
- _____ 11. Tap Into Their Dreams - Visions - Values (Market to Reinforce This)
- _____ = **Total** (Possible 33 points)

Question: Where do I need to improve? (Circle it above)

Action Task #7: Complete the Core Competency Assessment below.

Core Competency Assessment

1. What are your core competencies today? List here and then add them to your SWOT (strengths) in the next action task.

A. _____

B. _____

C. _____

2. How do they compare to your desired future ideal?

A. _____

B. _____

C. _____

3. Where is the “gap”? Add them to your SWOT (weaknesses) in the next action task.

A. _____

B. _____

C. _____

The concept of Core Competencies: Core Competencies are those vital few things that an individual and/or team/organization does that helps create their competitive edge. They are not just a “skill” alone, but rather a combination of different things, such as unique skills plus technology, equipment, location, etc. They flow from the unique talents and gifts we all have as individuals.

Action Task #8: Now, conduct the SWOT Analysis below. Be sure to do only the left side of each SWOT at first (we will discuss the right side afterward).

Action Hint: Review all the exercises you just completed, summarizing their key points here on all SWOT categories as appropriate. Take a good long, reflective time to do this.

SWOT FRAMEWORK - INTERNAL ANALYSIS

S: Strengths ("Build")	Action Implication Over Planning Horizon
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9	
10.	
11.	
12.	
13.	
14.	
15.	

SWOT FRAMEWORK - INTERNAL ANALYSIS

W: Weaknesses ("Eliminate/Cope")	Action Implication Over Planning Horizon
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9	
10.	
11.	
12.	
13.	
14.	
15.	

SWOT FRAMEWORK - EXTERNAL ANALYSIS

O: Opportunities ("Exploit")	Action Implication Over Planning Horizon
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9	
10.	
11.	
12.	
13.	
14.	
15.	

SWOT FRAMEWORK - EXTERNAL ANALYSIS

T: Threats ("Ease/Lower")	Action Implication Over Planning Horizon
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9	
10.	
11.	
12.	
13.	
14.	
15.	

Action Task #9: Once you have completed the first column of your SWOT analysis, review it with your whole planning team, and/or key stakeholders. Make additions/corrections as necessary. (You may find that some issues have two sides to them; i.e., they are both a strength and a weakness.)

Action Hint: In addition to conducting a SWOT analysis, it may prove helpful to look at (1) the roles you play in life, (2) each of your planning team or family members individually.

Action Task #10: Now, go back to your SWOT pages and, for each item listed, fill in the “Action Implications” column on the right-hand side of each.

Action Hint: You should be able to brainstorm at least one action for each item you listed in the left column. It is not necessary to agree on all these actions. They are just starting points to be used as brainstorming tools for the next step of developing core strategies and their actions and priorities.

Now You Are Ready for Strategy Development!

Step #5: Strategy Development creates the core strategies to bridge gaps between your Ideal Future Vision and your Current State Assessment. Key here is:

*"If you always do what you've always done,
you'll always get what you've always gotten."*

The strategy development step should result in focusing on 3-7 core strategies to be implemented by your planning team. You need a focused set of strategies as the primary means to achieve your ideal future vision. These strategies become the "glue" or the organizing principles and priorities used by everyone as a framework to set annual action plans.

Action Hint: Before looking at individual, couple, or family strategies, it may be useful to look at what is happening strategically in the public and private sector.

The 21st Century has seen a proliferation of new private sector strategies as firms try to cope with our rapidly changing times. They include:

- Flexibility and opportunism in looking for bargains (Giant Industries of Arizona).
- Life Process Reengineering (General Electric and others).
- Speed of product development (Toyota and Chrysler).
- Mass Customization, whereby a company like Toyota can deliver the specific features of a car you want in just a few weeks.
- Networks, Partnerships, and Alliances (Apple/IBM or Japanese Kieretsu's).
- Value-Added consumer bargains (larger packaging at the same price, such as Nissan selling their Maxima as a new "Luxury Sedan").
- Environmentally-Improved or -Based Products such as solar heat, recycling, and toxic waste clean up (Browning Ferris Industries).
- Horizontal Integration of related products and by-products (AM/PM Mini Marts). Also, Ethanol Plants in Saskatchewan tie in grain farming, mash for cattle, steam generation, and transportation.

These new strategies are in addition to those which became popular in the 1990s, including: Total Quality Management (although Deming's 14 points fail to mention the customer!), Empowerment, Self-Directed Work Teams, Visionary Leadership, Customer Service, Capital Leverage, Divestitures, Retrenchments and Cost Reductions.

In looking at these strategies, beware of those that are only of the “Cost Cutting” variety. These might include layoffs, re-engineering, budget cutbacks, etc. **“Cutting” is definitely necessary, yet alone is not sufficient for success.**

“Building-for-the-future” type strategies, focused on quality products and services that satisfy the customer, are key. This is where long-term correct strategies are found.

“Cutting and Building” strategies are absolutely BOTH needed!

In the public sector, there is a renaissance being talked about (and being accomplished in some places). Some of the principles/strategies behind this include:

The Renaissance in Government

13 Principles/Strategies of Entrepreneurial Government

1. Steer, not row (facilitate vs. do-it-yourself).
2. Empower communities and customers to solve their own problems rather than simply deliver services.
3. Encourage competition rather than monopolies.
4. Be driven by missions, not rules.
5. Be results-oriented, by funding outcomes rather than inputs.
6. Meet the needs of the customer, not the bureaucracy.
7. Concentrate on earning and making money rather than spending it.
8. Stop subsidizing everyone. “User-pay” through charging user fees.
9. Invest in preventing problems rather than curing crises.
10. Decentralize authority.
11. Solve problems by influencing market forces rather than creating public programs.
12. Reduce regulations; cut out bureaucracy and low risk taking.
13. Privatization (except for essentials not provided elsewhere).

Action Hint: Now that you have looked at some of the strategies being employed in various situations across North America, it is time to develop your own set of core strategies. Some personal, couple, and family strategies might include the following:

Personal, Family, and Couple Core Strategy Examples

1. Family roles - parents, children, grandparents, cousins, home, etc.
2. Personal - body, mind and spirit.
3. Career - job, profession, industry, career, education, wealth, lifestyle.
4. Community - friends, church, social organizations.
5. Travel - celebrations, yearly events.
6. Learning - personally, professionally, socially, degrees.
7. Contribution to Society - pro-bono work, financial contributions.
8. Cottage Industry - family-owned business.
9. "Make a difference" in society.
10. Other?

Action Hint: Develop your core strategies, using the above lists, as well as your SWOT analysis with its action implications from Step #4.

Action Hint: Based on your Vision and Goals, you will again probably have a mixture of personal and professional strategies. Keep in mind that these strategies apply to the entire timeframe and unit for which you are planning. Thus, they may not be applicable to each individual unit/family member, if this is a **Strategic "Family" Plan**.

Core Strategies

Action Task #1: What do you believe are the 3-7 (maximum) core strategies you should pursue over the life of your planning horizon to achieve your ideal future vision?

1. TO: _____
2. TO: _____
3. TO: _____
4. TO: _____
5. TO: _____
6. TO: _____
7. TO: _____

Action Task #2: Work and refine this list thoroughly with all planning team members, and/or key stakeholders to ensure there is consensus on your core strategies

Action Hint: Be sure these core strategies are written in the active tense, with an action verb and a complete sentence. You must be crystal clear as to what actions you desire. If you did your planning process thoroughly up to this point, this list shouldn't be a problem to develop. You have probably been discussing them informally throughout this planning process as you developed earlier documents.

Action Hint: The fewer the number of core strategies, the better. Making tough choices here in order to **"focus, focus, focus"** is the key to success in almost all Strategic Life Planning. Trying to be "all things to all people" rarely succeeds.

Paradigm Shifts of Changes in Your Core Strategies:

Action Hint: Since these core strategies are so critical to career success and life fulfillment, it is not enough to just have a good list of strategies in an active format and wording. In addition, **a clear list of the "changes" (or paradigm shifts) that these strategies entail is crucial.** It is important that you and other family members, as well as all your key stakeholders, be absolutely clear on exactly what is going to change.

Action Task #3: Complete the following paradigm shift of core strategies, listing exactly what is changing (new or improved) and what strategies are staying the same as they are today:

Changing Core Strategies (short phrases)

From:	To:
Strategy #1	
Strategy #2	
Strategy #3	
Strategy #4	
Strategy #5	
Strategy #6	
Strategy #7	

Are Any Core Strategies Remaining Unchanged?

1. _____
2. _____
3. _____

Action items for each core strategy are essential:

Action Hint: Each core strategy now needs a set of 5-15 action items to be completed in order to successfully achieve that strategy over the planning horizon. These become the major activities, personal priorities, and specific changes required over time.

Action Hint: Further, you need to identify the top 2-4 action priorities for each core strategy over the next 12 months (fiscal year). These provide direction for everyone in setting their individual goals for the coming year.

Action Task #4: Develop 5-15 actions to be accomplished over the planning horizon to achieve each core strategy (Use the forms provided on the following pages):

Action Task #5: Asterisk (*) the 2-4 priorities to be completed over the next 12 months on the same forms:

Core Strategy #1: _____

Action Items over the Planning Horizon

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

* = Next years top priorities (2-4 per Strategy)

Core Strategy #2: _____

Action Items over the planning horizon:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

* = Next years top priorities (2-4 per Strategy)

Core Strategy #3: _____

Action Items over the planning horizon:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

* = Next years top priorities (2-4 per Strategy)

Core Strategy #4: _____

Action Items over the planning horizon:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

* = Next years top priorities (2-4 per Strategy)

Core Strategy #5: _____

Action Items over the planning horizon:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

* = Next years top priorities (2-4 per Strategy)

Core Strategy #6: _____

Action Items over the planning horizon:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

* = Next years top priorities (2-4 per Strategy)

Core Strategy #7: _____

Action Items over the planning horizon:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

* = Next years top priorities (2-4 per Strategy)

Now it is time to “**Cascade**” the Strategic Life Plan down to your Annual Plans and Finances, and eventually, to Individual Yearly Reviews.

Step #6: ANNUAL “ACTION PLANS”/FINANCES is where “the rubber meets the road.” The key to any successful (i.e., excellent) implementation is this:

“Excellence is a matter of doing 10,000 things right.”

This step is where you develop action plans for the next 12 months (or calendar year). You also prioritize your tasks for the year and then provide the resources/responsibilities required to actually implement your core strategies.

Action Task #1: Each person involved in the planning should fill out the Annual Plan Format on the next page (for themselves) for each core strategy using the completed Strategy/Action Plan work as an aide.

Note: If you are doing this only as an individual, this is not necessary – you already did so under each of the strategies.

Action Hint: This consistency of organizing everyone under the same core strategies, is the key to an integrated and thorough implementation. This cannot be stressed enough. By **organizing everyone’s annual action plans under the same core strategies**, you will begin to think about achieving strategies **rather** than thinking about yourself only, or turf battles and turf protection.

**ANNUAL “WORK PLAN” FORMAT
(FOR FUNCTIONAL/DIVISION/DEPARTMENT PLANS)**

Date _____
Fiscal Year _____

#1 Strategies/Goals: _____

Yearly Pri. #	Action Items	Support/Resources Needed	Who Responsible?	Who Else to Involve?	When Done?	How to Measure?	Status

PERSONAL YEARLY REPORTING FORMAT FOR GOALS
(TARGET vs. ACTUAL)

Overall Coordinator: _____

Goal Areas (Headers): with Specific Factors for each	Baseline 2010	Intermediate Targets						Target 2015	
		2011		2012		2013		2014	
		Target	Actual	Target	Actual	Target	Actual	Target	Actual
1.									
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9.									
10.									

Note: Each goal might be tracked at different quarters (target vs. actual) depending on when the measurement is taken. However, each goal needs to be measured and reported at least yearly.

Action Hint: For couples completing this Strategic Life Planning process, it may be enough for you to just complete one set of annual plans for the entire process. See form for Priority of Annual Action Items that will cover everyone’s responsibilities.

Department: _____

Date: _____

Fiscal Year _____

PERSONAL ANNUAL “WORK PLAN” FORMAT

#1 Strategies: _____

Yearly Pri #	Actions	Support/Resources Needed	Who Responsible?	Who Else to Involve?	When Done?	Status During Year

It is not enough to have each person develop their own annual action plan in isolation from others on the planning team. What is needed is:

Action Task #2: An Annual Review Meeting of all planning team members. At this meeting, all annual action plans are shared, critiqued and refined, based upon their integrity to the yearly top priorities for each core strategy.

FINANCES/BUDGETING is the last part of Step #6 in our planning model.

Once you have completed your annual action plans, it is time to change the way you traditionally spend your finances. **Good budgeting needs to follow annual planning.** This will enable you to achieve a more focused allocation of your financial resources based upon your Strategic Life Plan.

***In addition, the tension between current allocations vs. future action priorities is normal and desired.** It helps you to focus your time and energy towards your top future priorities versus continuing to spend your limited resources in past habitual ways.*

It is important to build a family budget that focuses on your top priorities. Hence, the importance of the column called "Support/Resources Needed" on the Annual Planning Form.

Action Task #3: Fill in the "Resources" column on the Annual Plan Format.

Action Hint: A sample "resource allocation plan" and format is provided for your information. For those of you who are seriously concerned about the funding of your core strategies and action priorities, this is a good model to follow.

Monthly Financial Management (Pro-Forma Matrix)

Instructions: Based on your forecasted monthly income availability, conduct a “Resource Allocation Plan” using this Pro Forma Matrix as a guide. Add/delete future resources based upon your Core Strategies.

Income/Expenses	Actual	Planned
Gross Monthly Income (minus monthly expenses):	_____	_____
1. Home mortgage/rent	_____	_____
2. Taxes/insurance	_____	_____
3. Utilities (all)	_____	_____
4. Food – at home	_____	_____
– outside home	_____	_____
5. Entertainment – local	_____	_____
6. Automobile (all expenses)	_____	_____
7. Life/health/dental insurance/ expenses	_____	_____
8. TV/cable/newspapers/books	_____	_____
9. Household/yard maintenance	_____	_____
10. Telephone/fax/cellular/Internet	_____	_____
11. Security	_____	_____
12. Dry cleaning/laundry	_____	_____
13. Clothing	_____	_____
14. Hair care	_____	_____
15. Travel/vacation	_____	_____
16. Credit card payments	_____	_____
17. Memberships/clubs	_____	_____
18. Miscellaneous	_____	_____
19. Miscellaneous	_____	_____
Total Monthly Expenses =	_____	_____
= NET Monthly Income	_____	_____
+ Savings/Investments	_____	_____
NET Monthly Summary	_____	_____

Action Hint: The 21st Century, at least the first decade, seems destined to be remembered for its economic difficulties and lack of funding/revenues to operate. It is also just as significant on a personal level, as many individuals and couples are having difficulty maintaining their careers and standards of living.

Action Hint: Thus, creating and managing a workable budget is just as crucial for individuals and couples as it is for businesses. If you are planning as an individual or couple, you probably don't do any annual budgeting right now. If this is the case, you may want to begin doing some initial basic annual budgeting of your cash flow now. It will allow you to better focus your resources towards the achievement of your Ideal Future Vision.

Set aside the funds as you earn them for the important priorities in your lives. Don't just leave to chance your ability to fund your desires. If this changes the way you spend your money and your personal time that is the whole point of this process.

This is a much better way to live than just "paycheck-to-paycheck!"

Now that your annual plans and budgets are set, it is time to begin planning for implementation in Phase D!

PART V

How Do I Implement Life Plans Successfully?

*"Major Change takes three to five years,
even with concentrated and continual actions."*

*"Yet,
in five years you can change almost anything about
your life that you want to."*

Commitment to Success

*If you make a commitment to a given field of endeavor,
and if you spend the next five years of your life with the
magnificent obsession to learn all there is about that field,
you can be certain to become a success in that field.*

– Earl Nightingale

PHASE **D**: Implementing Change Successfully: “Plan-to-Implement”

“The marvelous richness of human experience would lose something of rewarding joy if there were no limitations to overcome. The hilltop hour would not be half so wonderful if there were no dark valleys to traverse.”

– Helen Keller

This Phase is not really Strategic Life Planning, but rather, the beginning of a successful implementation toward a fulfilling career and life. However, in using our Systems Thinking model and process, it has been clear from the beginning that there were three goals we wanted you to accomplish. Now it is time to focus exclusively on **Goal #2: Ensuring Successful implementation of your Strategic Life Plan.**

*Of the 14 Strategic Planning models we analyzed earlier,
none included had Step #7: Plan-to-Implement.*

Step #7: PLAN-TO-IMPLEMENT is the first step in Phase D.

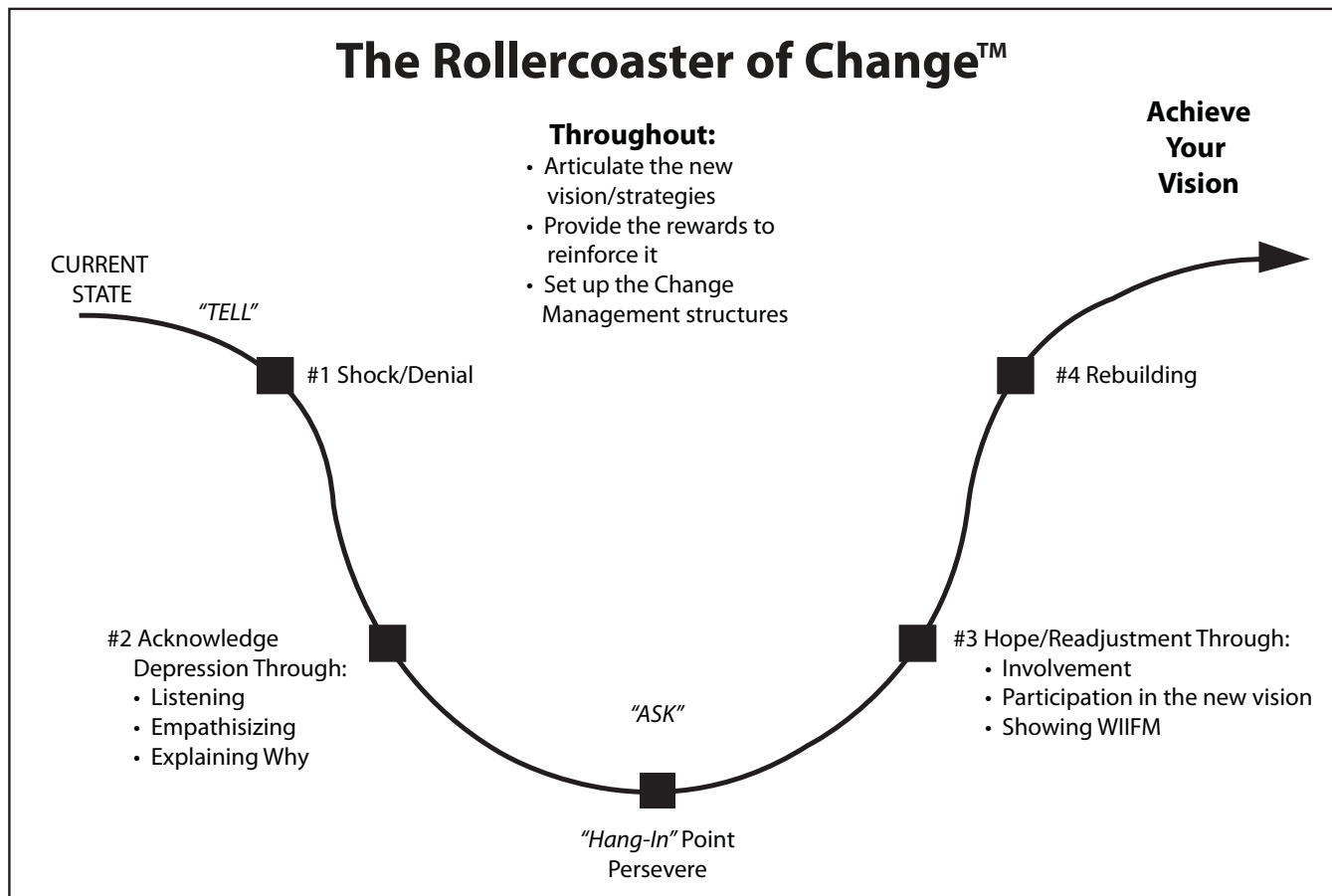
“Change is inevitable, progress is optional.”

There are two primary tasks of Step #8. The first task is to become “educated” on the issue of change. The second task is to complete a set of Plan-to-Implement organizing tasks very much like the earlier Plan-to-Plan prework (Step #1).

The main difference between these similar “Plan-To” steps is that this one is focused on the process of “educating and organizing” to manage the implementation of the Strategic Life Plan. Thus, it deals with that difficult subject – change

This step is also **THE CRUCIAL BRIDGE** between Strategic Life Planning and implementing strategic changes successfully and profitably. Therefore the first thing you need to fully appreciate is how change occurs in each of us, and in the numerous different situations we find ourselves.

To accomplish this we have included our copyrighted **“Rollercoaster of Change™”** diagram on the next page. This process of change is written about in many fields and in many different terms. However, when we looked at all the writings in different fields, this “Rollercoaster of Change™” was the common model that simplifies and clarifies the basic psychology of individual, couple or family change.



Action Task #1: Study this model and its four basic steps, keeping in mind that the reality of change is much more complex. Each person goes through this process at their own pace, depth, and length of time, creating a complex "mess" of change to be managed. We often undergo a number of different rollercoasters at the same time, i.e., personal, professional, social and spiritual.

Action Hint: The "bottoming out" or "hang-in there" point is often where success or failure is decided. This is because we must learn to "persevere" and "be disciplined" in our thinking and acting when times get tough.

"Persistence, disciplined persistence" is always a key to success!

Having studied this basic model, it may be helpful to know that there are a set of **major questions** on change that you need to keep in mind when implementing your changes in the core strategies, including:

1. Not “if” but “when” will we start to go through shock/depression?
2. How deep is the trough? Is it different for each person? Implications?
3. How long will it take? Are all of us at the same stage at the same time?
4. How do we manage change proactively?
5. Will we fully get up the right (optional) side and rebuild?
6. At what level will we rebuild?
7. What new skills do we need to accomplish this?
8. How many different rollercoasters will we experience in this change?
9. Are there other changes/rollercoasters occurring at the same time for us?
10. Will we hang in and persevere at the bottom? How?
11. How will we deal with normal resistance in ourselves and others?
12. How will we create a critical mass to support and achieve our desired changes?

Action Task #2: Discuss these questions of change fully among the full planning team members (and your key stakeholders).

Action Task #3: Make a list of the key points of change that will guide your implementation.

“Key Points on the Rollercoaster of Change to Guide Our Implementation”

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Once you have finished this “Educational Briefing” portion of the Plan-to-Implement, proceed to the **Organizing for Implementation and Change** portion. In it, there are a series of tasks to complete.

Action Task #4 : Review and finalize your Strategic Life Plan now. Package it into a formal document. This document is finalized by using the Keeping It Simple Sam/Sarah (KISS) method (12-20 pages in overhead, desktop publishing format). This allows the Strategic Life Plan document's use in a practical day-to-day fashion vs. the dreaded SPOTS (Strategic Plan On the Top Shelf) Syndrome.

Action Hint: Use the prototype "Strategic Life Planning Template" that can be found for sale at our online store at **www.SystemsThinkingPress.com**.

Now that you have finalized your Strategic Life Planning document, you need to share the plan with all of your key stakeholders supporting you as "devils advocates," ensuring your critical mass in support of your desired changes.

Action Hints: In order to achieve your desired changes, each of you also needs to understand and act on some additional **Change Management Concepts**. These concepts are just a way to combat the common-sense problems listed below:

The first problem is that, to achieve these desired changes, they will need to be nurtured, protected, encouraged and rewarded (i.e., "focused upon").

Secondly, despite good intentions, the crises of day-to-day living and working can drive out your focus on the changes. The result is that changes often are never fully implemented.

Action Task #5: Read the following page to manage and nurture yourself to reinforce your desired change. Then complete the action plan associated with it (5 Specific Actions):

Socrates said: "Let him who would move the world first move himself."

"You must be able to manage yourself to succeed, and to set a good example for those who work and live for you. Intelligence, education and drive are prime requisites for achievement, but they're worthless without the discipline that enables you to transport your abilities to the marketplace.

A true achiever is an individual who has reached his or her full potential as a human being."

– Raymond C. Johnson, The Achievers

How Do I Change?

What You Can Do:	How Others Can Help:
1. Recognize your mind traps, your beliefs.	1. Peer pressure to change.
2. Visualize the new identity you'd like to have.	2. Build a critical mass, informal support.
3. Have strong passion for the new identity.	3. Give valid feedback (+/-) from others.
4. Develop self-awareness of the change, and set aside time to reflect on it. Provide choices.	4. Involve others in some way.
5. Decide to change the self-doubting identity.	5. Get continued positive reinforcement.
6. Have faith that you can make the change.	6. Encourage support and reassurance.
7. Allow yourself to feel anxious.	7. Provide guidance and mentoring.
8. Diligently practice the new attitudes and behaviors.	8. Respect your values and dignity.
9. Become a compassionate self-observer (supportive and enthusiastic about one's self) in: suspending your disbelief on the new identity and being less self-conscious with the new behaviors.	9. Change your rewards/reinforcement.
10. Have a sense of humor about the change.	10. Accept yourself "as is".
11. Provide self-rewards for the new identity.	11. Provide continuity of certain support/follow-up.
12. Persistence - persistence - persistence.	12. Provide education and awareness training on change.

Seeking Feedback: Is feedback the "breakfast of champions?" Do you seek it individually and collectively to ensure focus on desired outcomes, even when painful? Constant feedback creates a competitive advantage in your career and life.

Action Hint: The key is encouraging and promoting feedback about yourself from others as well as from yourself. Key elements of this orientation towards “self” and “growth” will first include: tolerating pain, searching for the truth, having humility, being naive, letting go of your defenses, being open and courageous, and having faith in learning and growth.

“To be the best, you have to be totally honest with yourself...and others.”
– Thurman Thomas

Further, to combat the problem of “good intentions, but no follow-through” in change, **set up some form of a Reinforcement/Change Leadership Team to guide you and follow-up on the changes** dictated by the Strategic Life Plan (see below).

Action Task #6: Complete the exercise below to help develop your own action plan for change and reinforcement:

Action Plan for My Change and Reinforcement

What I Can Do?	Whom To Involve?	By When
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

In addition, you must set up a project or game plan to manage the change and implementation processes on a year-by-year basis, over the life of the planning horizon. We call this a “Yearly Comprehensive Map,” listing all of the needed implementation processes for your first year’s game plan (Action #7 below).

These Actions #5, #6 and #7 become the final pages in your formal Strategic Life Planning document.

These Change Concepts (the “Change Leadership Team” and “Yearly Map”) are so important that we will cover them fully and separately in the next sections.

You will need to hold Change Leadership Team meetings on a regular basis (every 2-3 months at a minimum) to ensure the successful implementation of your Strategic Life Plan (Goal #2).

Change Leadership Team: The Key to Success and Fulfillment

“Changing behavior always requires deep feelings.”

The Change Leadership Team is absolutely essential in successfully implementing your Strategic Life Plan. We can guarantee that your implementation will fail without it. Implicit in this Team and the Change Management Concepts is the understanding that we have to manage change before it manages us (in ways we may not like).

No one we have worked with has successfully implemented their Strategic Career and Life Plan without a Leadership Team to follow-up and keep them on track.

What follows is a summary of the Leadership Team’s parameters:

CHANGE LEADERSHIP TEAM

Purposes:

1. To guide and control the implementation of any Strategic Life Planning/change efforts undertaken.
2. To coordinate any other major performance improvement projects going on in your career and life at the same time; to ensure a good fit with the time and energy demands of ongoing daily work and career.

Action Hints: The Leadership Team is actually very similar to the Planning Team. Most of the guidelines for it are the same, i.e.:

- It has the same membership as the Planning Team (individual, couple, family, stakeholders, etc.).
- It meets every 1-3 months, depending on the intensity with which you want to implement your plan.
- It uses the Parallel Involvement Process and creates written communications after every meeting with key stakeholders.

The frequency and intensity of meetings are less than the planning. Instead, you should be putting all of your energies into implementing tasks rather than conducting meetings. These Leadership Team meetings are typically one-half day in length. It is crucial for these Leadership Team meetings to be held on a regular basis in order to pull back from day-to-day activities, scan the landscape and status of the Strategic Life Plan, and replan its implementation as necessary.

*The faster you want to succeed in implementation,
the more frequently your Leadership Team should meet.*

Action #6: Define your Change Leadership Team parameters below.

1. Team Purpose:

2. Team Membership:

3. Meeting Frequency/Length:

4. Meeting Location (offsite quiet place):

5. Names of Key Stakeholders :

6. Ways to include them?

Action Hint: Now, make a summary of these and insert them at the back of your formal Strategic Life Planning document (as previously mentioned).

Action Hint: There is a standard core Change Leadership Team meeting agenda that follows which can serve as a template for your meetings.

Keep in mind that there are three (minimum) mandatory agenda items for each of these meetings. They include:

1. continually scanning the changing environment for Plan, Life, and Career implications;
2. tracking and problem-solving your Goals and the issues surrounding them;
3. problem-solving issues surrounding your core strategies and top priority annual actions.

Lastly, you need to do a Yearly Implementation Project Plan for the process of implementation during the first year's fragile changes. We call this your "Yearly Map."

Action #7: Build a month-by-month Yearly Map of implementation. Do this as a total group. Include:

1. All meeting dates of the Leadership Team
2. Key action completion dates
3. The next Annual Strategic Life Review date (see the next section for details)

Action Hint: The Yearly Map is nothing more than a month-by-month project plan for what meetings and activities will occur during each month in the first years' implementation. Now, add this Map as the last set of pages to your formal Strategic Life Planning document, right behind your Leadership Team concept.

The failure to "bridge the gap" from planning to implementation is a major potential problem at this point. Most people fall prey to it naturally!

If your plan **truly** represents your top priorities, **then resource it, don't starve it!**

Invest in yourself and your human assets first!

Personal Yearly Map of Implementation

1. When to finish your Strategic Life Plan? _____
- Steps to do it include:

What	Who	By When?
1.		
2.		
3.		
4.		
5.		

2. Who to involve in your *Parallel Process* as “devil's advocates” for you?

Who	How to Involve Them?
1.	
2.	
3.	
4.	

3. One half to one day follow-up Formal Change Leadership Team Meetings:

- a. How frequent? _____
- b. Dates for next 12 months: _____
- c. Who attends? _____
- d. Location: _____

Personal Yearly Map of Implementation (continued)

- 4. Informal monthly reviews on the _____ of each month.
1st, 2nd, 3rd, 4th Saturday, Sunday, etc.
- 5. Weekly reviews at _____ am/pm each week on _____ (day).
Make up 3x5 cards on vision/top priority actions.
- 6. Annual Strategic Life Review (and Plan Update):
Which month? _____
Location? _____
of days? _____
With whom? _____

Annual Strategic Life Reviews: Updating Your Plans Yearly

*"What we think, or what we know, or what we believe is, in the end, of little consequence.
The only consequence.....is what we do."*

*"Nothing splendid has ever been achieved except by those who dared to believe
that something inside them was superior to circumstances."*

Step #8: STRATEGY IMPLEMENTATION (AND CHANGE)

To be successful, you must have your Strategic Life Plan transformed into hundreds of positive individual plans and efforts, with a rewards and recognition system tied to it. Every Vision is very difficult to achieve. It takes perseverance and focus. You must believe you can do it, and do what it takes to achieve it. Our beliefs lead to our actions. Action is the "bottom line" of Strategic Life Planning.

Again, this highlights the importance of the Change Leadership Team. You must lead the implementation process throughout the year by following-up and correcting mistakes via regular monthly/bi-monthly Change Leadership Team meetings. Disciplined persistence and integrity to the Plan throughout the year is key. You will "fall off the bike" of implementation during the year. That is normal and to be expected. Just get back on the bike, follow up on your actions and hold your next Change Leadership Team meeting.

Action Hint: On three occasions clients have chosen not to establish a Change Leadership Team to ensure follow-up and inspection. All three called later for assistance in conducting our last step in planning (Step #9) the **Annual Strategic Review (and Update)**. Afterwards, they installed a Change Leadership Team and re-started their stalled implementation.

*In all cases, once these meetings were organized and held, implementation, follow-up, inspection and results picked up speed. This is the key to **Goal #3: Sustaining High Performance over the long term.***

Step #9: Conducting an Annual Strategic Review and Update of your Strategic Life Plan is similar to a yearly independent financial audit.

***The Annual Strategic Review (and Update) has as its goal:
To assess the status of the Strategic Life Plan achievement itself.***

Action Hint: It is crucial that you conduct your Annual Strategic Review and Update. However, you may want to check with your tax accountant to see whether or not you can write off all or part of your Annual Review expenses – or not. Organizations hold annual retreats and planning sessions each year in some very nice places. Why can't individuals, couples and families do the same thing in a legitimate way?

Going to a nice resort or wilderness retreat is a creative and freeing way to do the proper job of Strategic Life Planning. It is even better to bring along your trusty “laptop” computer to write the plan while you are there, as well as use the computer’s date/time stamp to document the work. This idea works legitimately as long as your planning incorporates some “for profit” business that these expenses can be applied against. Again, consult with your tax preparer.

The Annual Strategic Review and Update includes the following three main tasks:

1. Reacting to changes in the environment and implications for updating your Core Strategies.
2. Updating Annual Action Plan priorities for the next 12 months while holding the Annual Strategic Review and Update Meeting.
3. Updating the success of your Strategic Change Leadership Team Yearly Map.

Action Hint: At this point you should have developed an excellent Strategic Life (and Career) Plan for yourself and/or your family. Now, your main “planning task” is not to redo this Strategic Life Plan, but to review it and update it annually as necessary.

*“The world would be a far better place if...
each of us could change only one individual each – ourselves!”*

Action Task #1: Review this individual self-change process and answer the questions that follow:

Look In The Mirror

I. Awareness (unfreezing)

1. Awareness of need/desire to change
2. Understanding and education – knowledge – self disclosure – and feedback on what to change

II. Choice (decision)

3. Attitude and Skills
 - Willingness/discipline/conviction to change
 - Willingness to acquire new skills/be naive
4. Organize a Program
 - Organize a change effort
 - Support for fragile nature
 - Incentives to change (intrinsic/extrinsic)

III. Change (action)

5. Self-Change
 - Take action/be awkward
 - Get feedback on how you're doing
6. Build Habits - through maintenance/feedback - follow-up/reinforcement

Questions

1. Where are you in the self-change process?
2. Where are your weaknesses on Steps 1-6 above?
3. What next steps do you need to take (use the "To Do" List below)?

To Do List

Steps	Whom to Involve?	By When?
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____

Verifying your Vision, Mission and Personal Values; checking your Goals and Core Strategies, while completely redoing your annual action plans, priorities is now the primary yearly cycle you need to follow.

Action Task #2: Now go back and redo your Strategic Plan on an annual basis.

Action Hint: What we have been helping you build (since page #1 in this book) is a **“Strategic Life Management System” for the way you live your life and career.**

We believe it is extremely important for people to develop strategic plans for their lives and careers. However, once you develop plans, **it is vital to have a SYSTEM OF MANAGING STRATEGICALLY** from these plans.

Don't Let the Day-to-Day Ruts Defeat You!

Recapping: Creating a New Way to Live Your Life and Career Day-to-Day

Wisdom

- *To attain knowledge, add things every day.*
- *To obtain wisdom, remove things everyday.*

– Lao Tse

The meaning of the title of our book, **Strategic Life Planning**, should be clear to you by now. If you have read and completed this self-paced text, thus far, you are to be congratulated! “Adults learn best by doing” is the byword of adult learning theory, the world you have just finished traveling.

You should now be well on your way to **“designing, building and sustaining”** a fulfilling life for the 21st century.

We started out this book with Part I – “Welcome to the World of Strategic Planning and Backwards Thinking.” The crucial difference between Strategic Life Planning and other types of personal planning has been specified as starting with a desired ideal future, and then thinking and working backwards toward the desired future. It sounds simple, but in practice it’s as difficult as any other plan, with the following difference: It works!

We quickly went on to Part II and covered the crucial “educating” portion of our initial Plan-to-Plan prework step in Strategic Life Planning. In it we looked at Three Basic Premises in our Model. To recap them briefly:

The Three Basic Premises are:

- I. Planning is a Part of Life**
- II. People Support What They Help Create**
- III. Use Systems Thinking (Backwards Thinking)**

The key point in our copyrighted Rollercoaster of Change™ model is the importance of having **disciplined persistence** in overcoming the frustration with change at the difficult “bottoming-out” point. This is often what separates the winners from the losers in life; discipline and persistence in carrying on when things get tough! As we have discovered, in every process of Change, the Rollercoaster model applies. Knowing that in advance is a powerful tool in your hands.

In Part III, we discussed why all individuals, couples and families need to conduct a strategic life and career planning process for themselves. We then covered numerous Plan-to-Plan tasks in order to “engineer success up-front” in Strategic Life Planning.

In Part IV, we led you through the Systems Thinking Approach® to Strategic Life and Career Planning, using **the A-B-C-D-E Phases of system’s thinking as locator points and guideposts.**

In Part V, we provided “education to individuals, couples, or families” for successful implementation through the Plan-to-Implement (step #8). Key to this success is the formation of a Strategic Change Leadership Team, and its yearly map, to guide the difficult strategy implementation and change.

Only then should Step #9; Strategy Implementation and Change commence. Failure to plan implementation is planning to fail.

Finally, Step #10; the Annual Strategic Review (and Update) stressed the importance of reviewing and updating your strategic life and annual plans on a yearly basis.

All of these prework, planning, implementing, and updating steps are what we mean by a **“Strategic Life Management System”** as the new way to run your job, life, and career, day-to-day.

The Strategic Life Management System we have detailed is the key to unlocking and opening up the mystery of successful Strategic Life Planning. It is also the key to functioning successfully, and in a fulfilling manner, in your life.

**Summarizing:
A Challenge for the Future**

*"You can, and should shape your own future
because if you don't,
somebody else surely will!"*

In these turbulent times, it is easy to feel like a powerless victim of circumstances. The Systems Thinking Approach® to Strategic Life Planning is all about helping each other, our families, and ourselves be empowered in a very effective way.

What other choice do we have? Do nothing and accept life as it's handed to us? Try to maintain the status quo? That is a recipe for falling behind and failing in our lives. In today's highly competitive and dynamically changing environment, the stakes are literally "do or die" – if not physically, most certainly financially and occupationally. To avoid tough choices is to let the future health and performance of your career and lifestyle be determined by circumstances that are increasingly beyond your control.

Change is a constant, and embracing it, and working it, is our only real option.
We must become "Architects of our future, not defenders of its decline."

Commitment, perseverance, and focus are the only explanations for sustained differences, over time, in the performance of individuals, couples, and families of all types. Use your Strategic Life Plan and our Backwards Thinking process to help you focus your life and your career. Put in place your Change Leadership Team and make it happen now!

In summary, with the completion of our Strategic Life Planning Model you can successfully lead the design and building of your Ideal Future Vision for your life.

– Success Is –

To laugh often and much;

To win the respect of intelligent people and the affection of children;

To earn the appreciation of honest critics and endure the betrayal of false friends;

To appreciate beauty;

To reflect on, and respect, nature;

To find and foster the best in others;

To leave the world a bit better, whether by a healthy child,

a garden patch, or a redeemed social condition;

To know even one life has breathed easier because you have lived.

This is to have succeeded.

“Service is the rent we pay for living.

It is the very purpose of life

and

not something you do in your spare time”

APPENDIX:

**Strategic Career and Life Plan
of
Steve and Jayne Haines**

Strategic Life Plan
Jayne and Stephen Haines
1993 - 2000 - 2006 - 2012



“Make a Difference”

Ventana, Big Sur, California
November 24, 1992

~ Updated ~

Tampa, Florida, November 27, 1993

Chicago, Illinois, May 29, 1994

San Diego, California, December 30, 1994

Hayman Island, Australia, September 22, 1995

Auckland, New Zealand, April 5, 1996

Cairns, Australia, May 4, 1997

Cozumel, Mexico, January 1, 1998

Bali, Indonesia, April 14, 1998

Windspirit” in BVI, January 7, 1999

Opryland, Tennessee, December 10, 1999

“Sky” in West Caribbena, January 4, 2001

San Diego, California, December 25, 2001

San Diego, California, July 11, 2003

San Diego, California, December 15, 2004

Big Sur, California, December 25, 2005

San Diego, California, December 25, 2006

Pine Mountain, GA, November 8, 2008

Aruba, September 1, 2009

Cabo Azul, December 25, 2009

Our Vision

(Updated 12/25/08)

BY WHEN?

December 23rd of Year: 2012

OUR VISION:

Our Vision is to be physically healthy in order to lead an intimate and happy life together, in which we are financially independent and can choose when, and how much, to work.

We will make a positive difference in our own lives, the lives of each other, our family (especially our grandson, Sebastian), and the lives of the primary people with whom we come in contact.

We Believe in Making a Difference

Our Vision

(Updated 7/11/08)

Our purpose and reason for being is to “make a difference” through our existence, in the following ways:

1. Caring for each other and ourselves with love, sharing, intimacy, fitness, learning, and balance in all aspects of our lives (e.g. body, mind, emotions, spirit, and time freedom).
2. Sharing with our family and close friends our love, caring, support, time, and celebration of life in mutually enjoyable ways.
3. Assisting clients and Centre Members in the definition and achievement of their Visions.

Our Core Values

★ The way we live our lives while “making a difference” ★

(Updated 1/1/06)

1. **Integrity:**
Honesty, directness and integrity in all our relationships
2. **Sharing:**
A caring, service- and abundance-orientation with others
3. **Learning:**
Systems Thinking and continuous life-long learning is a way of life
4. **Service:**
High quality professionalism and service (go the extra mile)
5. **Environmental Awareness:**
Be environmentally sensitive and responsive in all we do
6. **Spirituality:**
Belief in the basic goodness of the human spirit and the presence of God in our lives
7. **Simplicity:**
Clarify and simplify the way we live our lives and do our work
8. **Fitness:**
Fitness and health as a basic daily foundation for living

Our Key Success Measures

(Updated 1/1/06)

The quantifiable measurements of our Vision, Mission, and Values on a year-by-year basis, to ensure continual improvement towards achieving our Ideal Future Vision.

1. Healthy
2. Prosperous
3. Honesty/Integrity
4. Sharing our abundance
5. High quality professionalism and service
6. Proactive strategic life management
7. Travel and celebrate life
8. Simplicity

Steve and Jayne's Strategic Life Plan: Key Success Measures

[illegible]

Steve and Jayne's Strategic Life Plan: Key Success Measures

[illegible]

Steve and Jayne's Strategic Life Plan: Key Success Measures

[illegible]

CORE STRATEGIES

(Updated 1/4/09)

STRATEGY #1: HEALTHY (P)

BECOME FIT AND HEALTHY IN BODY, MIND, SPIRIT AND TIME.
(e.g. change to a healthy lifestyle).

STRATEGY #2: FINANCES (P/B)

CONTINUE TO MOVE TOWARDS AN INDEPENDENTLY WEALTHY FINANCIAL STATE.

STRATEGY #3: PROFESSIONAL SERVICES (B)

BE OF SERVICE TO OTHERS WITH HIGH QUALITY PROFESSIONAL SERVICES AND CUSTOMER SERVICE.

STRATEGY #4: SHARING ABUNDANCE (P/B)

MAKE A DIFFERENCE THROUGH SHARING OUR ABUNDANCE.

STRATEGY #5: INTEGRITY (P/B)

CONTINUALLY LIVE WITH INTEGRITY AND HONESTY (e.g. all values).

STRATEGY #6: PROACTIVE (P/B)

PROACTIVELY PLAN AND MANAGE OUR LIVES AND STRATEGIC LIFE PLAN (i.e. a Strategic Management System) TO ENSURE OUR VISION IS LIVED ON AN ONGOING BASIS.

STRATEGY #7: CELEBRATE LIFE (P)

TRAVEL, VACATION AND CELEBRATE LIFE WITH EACH OTHER, FAMILY, AND FRIENDS.

2010 ACTIONS

Strategy #1: Healthy (Life)

BECOME FIT AND HEALTHY IN BODY, MIND, SPIRIT, AND TIME

(e. g. change to a healthy lifestyle)

Actions:

Lead	Activity
Steve:	1. Exercise, walk or do recreational activity 3/4 of 7 days (5 PM/Walk, 6:30 Dinner with small portions or Exercise in basement 8:00 to 8:30). SH exercise at night on the road (30 minutes) and in AM for JH.
Jayne:	2. JH/SH lose weight each month - until weight goal is achieved
Steve:	3. Continue Mondays without client work (max. 3 days/wk with client work max. 10 days/mo. with clients. Stay away from weekend client work/travel (3 out of 4).
Jayne:	4. Attend church service/event 2 times a month.
Both:	5. Share our lives intimately at a spiritual and physical level on an ongoing basis.

2010 ACTIONS

Strategy #2: Finances (Life/Business)

CONTINUE TO MOVE TOWARDS A PROSPEROUS AND INDEPENDENTLY WEALTHY FINANCIAL STATE

Actions:

Lead	Activity
Steve:	1. Steve works 10 full billable days a month (maximum) with clients; 120 days a year worldwide max. including profitable workshops.
Steve:	2. Product Development: <ul style="list-style-type: none"> - update book editions (have plan and staffing) - increase CD Products and e-Books - build reseller program
Steve:	3. Restructure HCSM to keep it simple and profitable
Steve:	4. Build a plan for retirement

2010 ACTIONS

Strategy #3: Professional Services (Business)

BE OF SERVICE TO OTHERS WITH HIGH QUALITY, PROFESSIONAL SERVICES

ACTIONS:

Lead	Activity
Steve:	1. Keep office automation current.
Steve:	2. Have 2-3 preferred (i.e. long-term enterprise-wide clients) per year with yearly maps for each and limit others.
Steve:	3. Build San Diego awareness, clientele, visibility (monthly meetings)
Steve:	4. Investigate how to finish doctorate.
Steve:	5. Increase revenue of Systems Thinking Press
Steve:	6. Go for more keynote speaking as part of Steve's Practice

2010 ACTIONS

Strategy #4: Sharing Abundance (Life and Business)

MAKE A DIFFERENCE THROUGH SHARING OUR ABUNDANCE

ACTIONS:

Lead	Activity
Jayne:	1. Give money each week to the church
Jayne:	2. Give to other charities, i.e. our alma maters
Steve:	3. Do pro bono or work for minimum professional fees (two to three clients a year)
Steve:	4. Assist other Centre members with building their practices
Steve:	5. Set up strategic alliances with other firms as needed
Steve:	6. Assist Association for Strategic Planning

2010 ACTIONS

Strategy #5: Integrity (Business)

CONTINUALLY ASSESS OUR INTEGRITY, HONESTY, AND ENVIRONMENTAL COMMITMENT (e.g. all values).

ACTIONS:

Lead	Activity
Steve:	1. Review Haines' Life Plan and KSMs (Spring/Fall) at Strategic Change Leadership Team offsite retreat location. Also review during summer week off at home/Seaview
Steve:	2. Build and review HCSM plan quarterly <ul style="list-style-type: none">- update yearly- check ups monthly

2010 ACTIONS

Strategy #6: Proactive Life (Life and Business)

PROACTIVELY PLAN AND MANAGE OUR LIVES AND STRATEGIC LIFE PLAN

(i.e. a Strategic Management System) TO ENSURE OUR VISION IS ACHIEVED ON AN ONGOING BASIS.

ACTIONS:

Lead	Activity
Steve:	1. Steve travel - plan out each month <ul style="list-style-type: none">- 6 days a month away from Jayne- almost no work or travel on weekends- Jayne travel with Steve 4 times a year.
Steve:	2. Plan International/Global travel six months or more in advance.
Jayne:	3. Yearly planning review cycle (including year-end review) offsite each January for the Haines' Life Plan.
Jayne:	4. Deposit money each month into retirement.
Steve:	5. Redo decks/house interior.
Jayne:	6. Have hall closet refitted and get security screen door.
Steve:	7. Paint interior of house.

2010 ACTIONS

Strategy #7: Celebrate Life (Life)

TRAVEL AND CELEBRATE LIFE WITH EACH OTHER, FAMILY, AND FRIENDS.

ACTIONS:

Lead	Activity
Steve:	1. Season tickets to Chargers and share with friends.
Steve:	2. Season tickets to Padres and share with friends.
Both:	3. Entertain friends <ul style="list-style-type: none">- USNA 1968/HCSM
Jayne:	4. East Coast visits to see family (three a year) <ul style="list-style-type: none">- Spring- Summer (Seaview)- Thanksgiving
Steve:	5. Big trips by us (one a year in December/ January and June/September) <ul style="list-style-type: none">- go to Big Sur in December- Mexican Rivera or Cabo in Fall
Both:	6. Other smaller trips – targets of opportunity

Implementation Game Plan

1. Quarterly meetings at a week end retreat to review this plan – stay on track:
Spring and Fall. Check plan during summer.
2. Update and Year End Review Cycle (December) - location TBD.

Future Big Trips

'A' List

- River boat cruise/one every two years in Europe (summer)
- Fjords of British Columbia/ Orcas at Robson Bight (summer)
- Panama Canal/Costa Rica
- Nova Scotia (Cabot Trail)/Prince Edward Island
- Fiji
- Switzerland
- United Kingdom (Scotland/England/Ireland)
- Hawaii/Big Island

'B' List

- St. Laurence Seaway/ Fjords
- Jamaica
- China
- Polar Bears at Churchill (Summer)
- Rock Resorts – St. Johns or British Virgin Gorda (BVI)



SMART START: EXECUTIVE BRIEFING BOOKLETS

Strategic Management: The Systems Thinking Approach®

300+ POTENTIAL POWERPOINT SLIDES

Simple, yet comprehensive PowerPoint formatted hard copy booklets, for briefing executives on eight specific Strategic Management topics from 1-hour to 1-day Briefings. These proven Best Practices will create a high impact on Senior Management. Each booklet has the potential for easily developing customized PowerPoint slides. 150+ pages each, these 6x8 booklets contain specific handouts, check lists, quotes, surveys, models, and exercises for the Executive and Management Team to explore different Strategic Management topics in a clear and simple ABC flow.



FREE WITH EACH BOOKLET

Executive Summary Article



Avoid Shipping Charges by Choosing e-Books!
Save time and money. Download directly from the web—fast and easy. Available on all eight topics.

e - Book \$24.95 each

Price includes FREE UNLIMITED
Reproduction Rights!

CD-ROM PACKAGE

Complete Set of All Eight Booklets

Code: ALLEBS-CD \$1595.00

Price includes FREE UNLIMITED
Reproduction Rights!

SAVE
\$400

EIGHT STRATEGIC MANAGEMENT TOPICS

HARD COPY PRICE - \$24.95 each

1	Strategic & Systems Thinking™	Code: EBSST
2	The ABCs of Strategic Management™	Code: EBRSP
3	Achieving Leadership Excellence™	Code: EBALE
4	Leading Strategic Change	Code: EBEWC
5	Creating Customer Value	Code: EBCCV
6	Strategic People Edge & HR Management	Code: EBHR
7	Strategic Marketing and Sales Planning	Code: EBMARK
8	Three Year Business Planning	Code: EB3YR

HARD COPY PACKAGES

Complete Set of All Eight Booklets

Code: ALLEBS \$149.95

+1200 PAGES IN EACH PACKAGE!

SAVE \$40
BUY ALL 8

Strategic Management Series

Includes:

• EBRSP • EBLSC • EBSST
• EBCCV • EBMARK • EB3YR

Code: SMEBS \$149.95

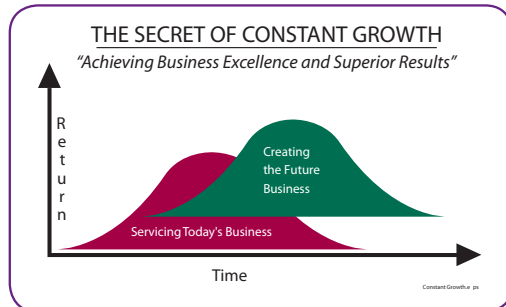
OUR "NOTHING-TO-LOSE GUARANTEE"

I. Our unconditional guarantee of high quality services: We unconditionally guarantee each speaking, training and consulting event/project that we conduct for you. In the unlikely occurrence that you do not get "Value-Added" from the time we spend together, pay us our expenses only and the day's fee is waived.

II. Our unconditional guarantee of high quality materials: If for any reason you are not satisfied with any of Systems Thinking Press' hard copy materials, you may return them within 30 days for a full refund—no questions asked.



SMART START PROCESS for Executives and Senior Management



Enhance Your "Strategic IQ"™!

The Centre's Smart Start: Strategic IQ™ Audit, Executive Briefing and Plan-To-Plan Sessions are designed to establish a common set of principles and knowledge on the specific Strategic Management project that your organization needs to develop or improve. By using these Systems Thinking Approach® principles, and Audit results, you can develop an Enterprise-Wide Planning and Change Game Plan for successful execution. Build your capacity to achieve and sustain business excellence and superior results.

Achieve Organizational Clarity, Simplicity and Superior Results!

EXECUTIVE BRIEFING / SMART START OUTLINE

DAY ONE-STRATEGIC AUDIT

Initial meeting with CEO on purposes/introductions/wants

- Initial meeting with Senior Management on Strategic IQ Audit
- **Begin Strategic IQ Audit Process-** Conduct analysis of business documents (economic, customer, operational and strategic).

Continue Strategic IQ Audit Process -

- Hold 1-1 data collection sessions as necessary
- Client Objectives meeting with CEO and other decision makers

DAY TWO-EXECUTIVE BRIEFING/PLAN-TO-PLAN

Executive Briefing: "Educating and Assessing"

- Choose from eight Strategic Management Topics
- Learn the research on Proven Best Practices
- Assess your organization vs. these Best Practices

Plan-To-Plan Tasks: "Organizing and Tailoring"

- Organize and engineer success up front
- Tailor the change process to your needs
- Present Strategic IQ™ Audit Results
- Build a practical and realistic "Game Plan"

EIGHT EXECUTIVE BRIEFING DAY TOPICS

Strategic Management: The Systems Thinking Approach®

1. Becoming a Strategic and Systems Thinker
2. Reinventing Strategic Planning
3. Leading Enterprise-Wide Change
4. Creating the People Edge (Strategic HR Management)



5. Achieving Leadership Excellence
6. Becoming Customer Focused
7. Aligning Delivery & Distribution (Business Planning)
8. Creating Customer Value (Positioning & Design)

The Systems Thinking Approach® Science-Based Proven Research

- We are Interpreters and Translators of Proven Best Practices Research from the Science of Living Systems.
 - We tailor these Best Practices into powerful, practical and easy to use, simple tools.
- We own Systems Thinking Press® the "Premier Publisher and Clearinghouse for Systems Thinking Resources"
- Visit our web site www.SystemsThinkingPress.com • Learn about ALL our Strategic Management Materials.

"Failing to Plan is Planning to Fail"

www.CentreTraining.com



Phone: 619-275-6528 - Fax: 619-275-0324 - Email: info@SystemsThinkingPress.com - Website: www.SystemsThinkingPress.com

1420 Monitor Road • San Diego, CA 92110-1545 • (619) 275-6528 • Fax: (619) 275-0324
www.SystemsThinkingPress.com • Email: info@SystemsThinkingPress.com

Haines Centre for Strategic Management

Integrated Lines of Business



Celebrating 20 Years of Business Excellence



The ABCs of Strategic Life Planning...

...is an easy-to-follow guide to planning your life and career, using the **Systems Thinking Approach**®

Author **Stephen Haines**, with his wife Jayne, share their own personal life plans, as examples of how to develop and achieve your own Individual, Professional, Team, Couple, Family, or Family-Owned Business goals.

Stephen Haines, the world's foremost expert in the Systems Thinking Approach to Strategic Management, has traveled the globe teaching this most effective approach to solving problems and achieving goals.

Planning is essential to reaching life goals, and this workbook-style manual takes you on a step-by-step journey through **Discovery**, **Strategies** and **Actions** needed to get there – by setting a course through **"Backwards Thinking"** – the key to the puzzle that you'll find solved in this book.

Systems Thinking Press®

www.SystemsThinkingPress.com

an integrated business unit of
Haines Centre for Strategic Management.

**THE LEADER IN SYSTEMS THINKING
EDUCATION, APPLICATIONS, AND RESOURCES**

ISBN: 0-9760135-2-5

