



A Production of
The Personal Strategy Institute

How To Design a Personal Strategy for Living

Part 1 of 5

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The Case for Action

The Need for Personal Strategy

- Personal Reason:
 - You have been laid off and are trying to determine next steps
 - Your career has stalled and are looking to make a step change in your career and life
 - You feel your life is misaligned/unbalanced with who you are and want to be on the surface of life
 - You have defined substantive, life-changing goals and feel having a personal strategy will help you most quickly achieve such goals
 - You are unhappy with current condition and are looking reengineer self and life
- Environmental Reason:
 - There is increased global competition for jobs and you want to establish a personal competitive advantage over others
 - The world is changing at an ever rapid pace and you want to be ahead of change; want to adapt quickly and adequately to change

What is Strategy?

- Strategy is, quite simply, a long-term plan or policy
- To create effective strategy, to develop a precise, actionable plan, it also requires understanding the purpose or essence of strategy:
 - Strategy represents movement from a 'present position' to a desirable, but uncertain, 'future position'
 - Strategy requires doing many things well, not just a few, and integrating them
 - Strategy is about overcoming obstacles, achieving goals, and delivering results
- We may be most familiar with a company developing a strategy to improve its market share, increase revenue, or better serve its customer base. However, nations, communities, sports teams, and individuals find reason to develop strategy as well
- More than ever, there is need for individuals to create a personal strategy for living

What is Personal Strategy?

- Using the framework from previous slide, we could say the purpose or essence of personal strategy is...
 - To move from our 'present position' in life, to a desirable, but uncertain, 'future position' in life
 - To do many things well in life, not just a few, and integrate them
 - To overcome obstacles, achieve goals, and realize a fragrant life

Personal Strategy	Team-Based Strategy
Authored by an individual	Authored by a group of individuals
Focus is on individual	Focus is on group
Benefits an individual	Benefits a group
Takes days and weeks to define and implement	Takes months and years to define and implement
Reflects individual goals; personal vision	Reflects group goals; group vision
Essence is to improve one's life	Essence is to improve a team



What are the Benefits of Personal Strategy?

- We are able to develop precise, actionable plans to achieve our goals
- Breathes life into our goals; keeps our goals in our face and top-of-mind
- We are able to achieve our goals faster with reduced effort
- We are able to maximize the personal, professional, and financial potential that life offers
- Achieve personal alignment
- We are able to realize our vision for self; of who we are and were meant to be on the surface of life



How Does One Develop Personal Strategy?

- Developing a personal strategy is a process
- Part I – Introduction to Personal Strategy Maps
- Part II – Introduction to Personal Strategic Themes
- Part III – Build Personal Strategy
- Part IV – Keeping Score (of Personal Strategy)
- Part V – Living a Strategy Driven Life

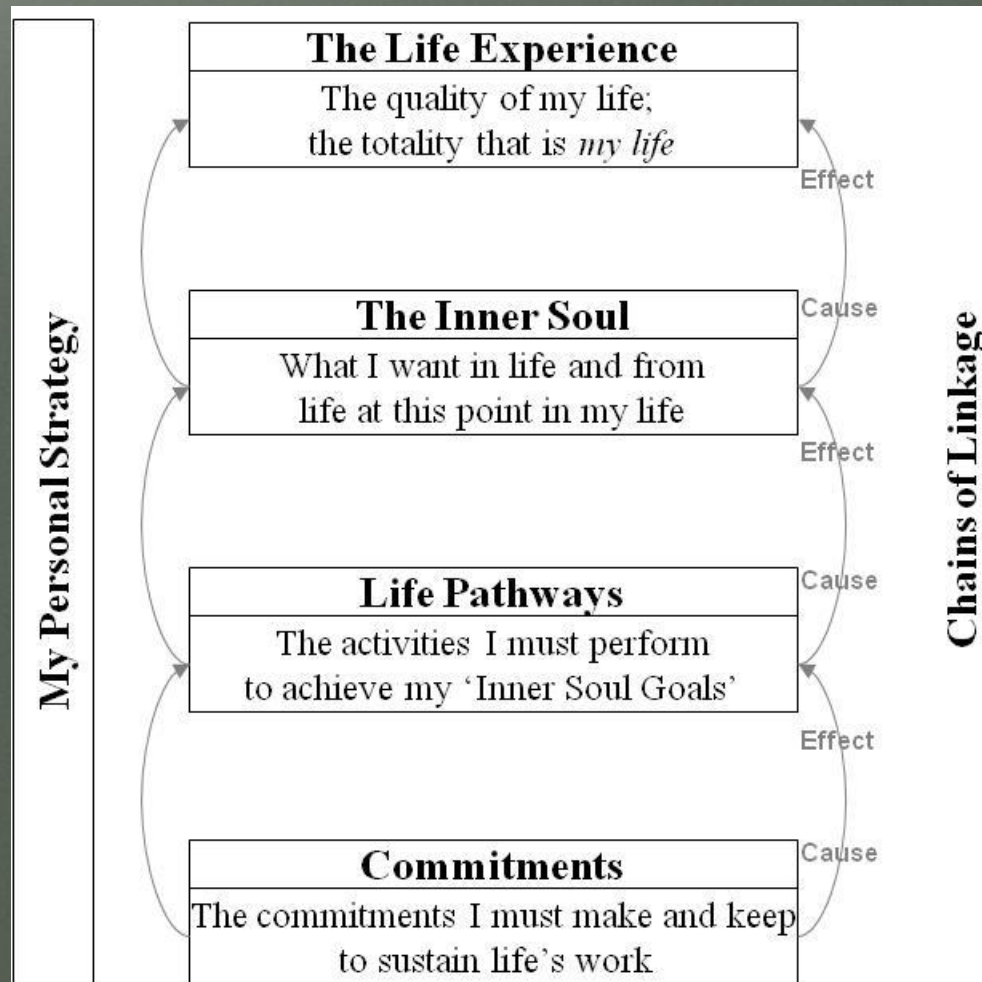


Introduction to Personal Strategy Maps

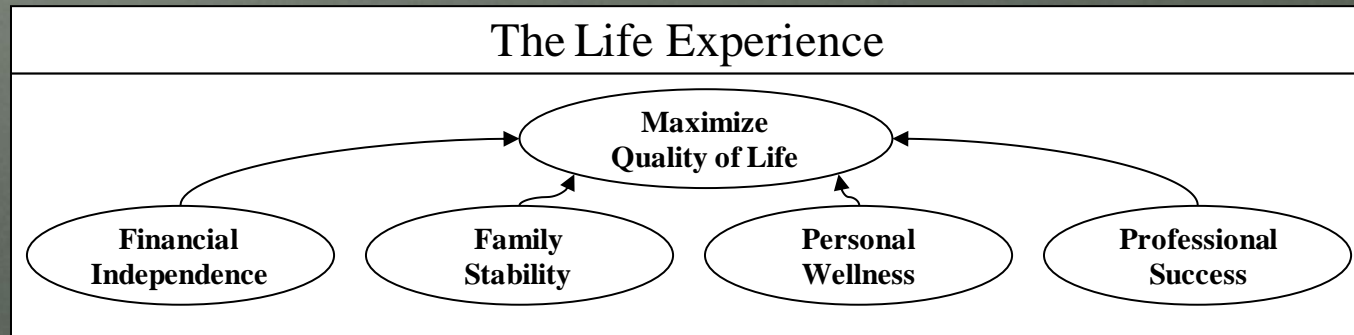
- A Personal Strategy Map is...
 - A framework for defining, organizing, and documenting your personal strategy for living
 - A graphical representation of your current life strategy
 - A way to communicate what you want in life and from life at any point in your life
 - A roadmap to achieve your goals and maximize the quality of your life
 - The 'what' of personal strategy
- There are (4) components that comprise a Personal Strategy Map
 - The Life Experience
 - Reflects outcomes and, therefore, the quality of your life; the totality that is your life
 - The Inner Soul
 - Reflects desires of soul; what you want in life and from life at this point in your life
 - Life Pathways
 - Represent the activities that you must perform to achieve your inner soul goals
 - Commitments
 - Represent the personal commitments you must make and keep to sustain life's work

Personal Strategy Map

A Roadmap to Achieve Your Dreams

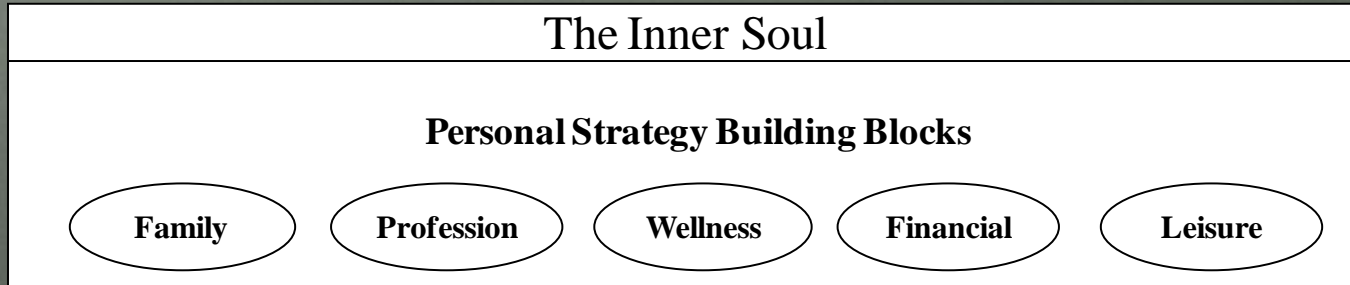


Component: The Life Experience



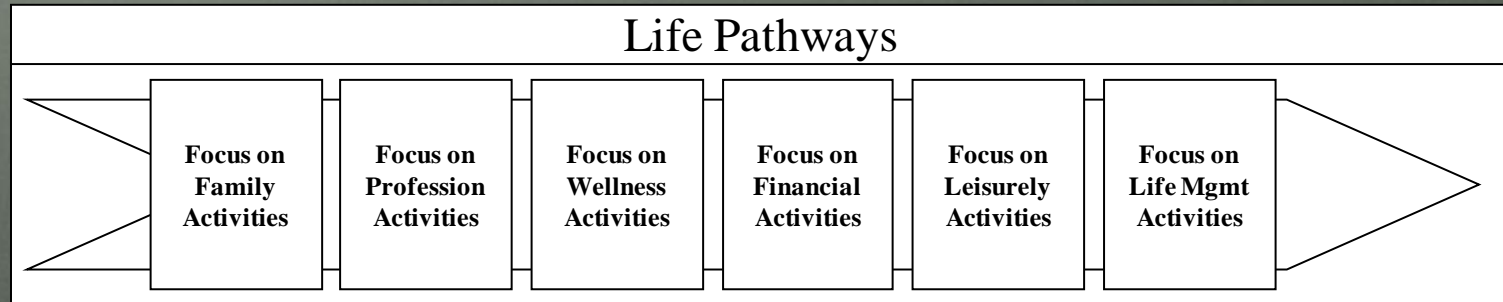
- The Life Experience reflects outcomes and, therefore, the quality of your life; the totality that is your life
- To evaluate, assess, measure our life experience, we use four generic categories, each representing a different aspect of our life:
 - Financial Independence
 - Family Stability
 - Personal Wellness
 - Professional Success
- Collectively, the 'state' of these four categories reflects the *quality of your life* and how you will look back on your life in totality

Component: The Inner Soul



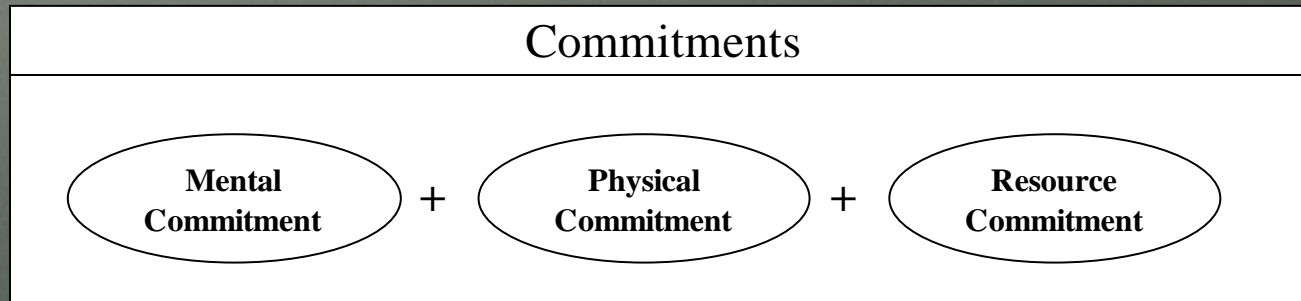
- The Inner Soul reflects desires of soul; what you want in life and from life at this point in your life (aka 'Inner Soul Goals')
- To determine wants, to reveal one's inner soul goals, we use the following personal strategy building blocks:
 - Family, Profession, Wellness, Financial, and Leisure
- Most inner soul goals align with one of these categories and, therefore, using such categories is helpful in determining what we want in life and from life throughout life

Component: Life Pathways



- Life Pathways represent the activities that you must perform to achieve your inner soul goals
- They are personal processes that characterize every day living
 - Examples:
 - The process of [getting ready in the morning]
 - The process of [planning a birthday party]
 - The process of [finding a job]
 - The process of [planning a vacation]
- It is through performing life pathways that we achieve our inner soul goals. As such, inner soul goals provide context for what activities (life pathways) to perform in life; what activities have highest priority on the surface of life

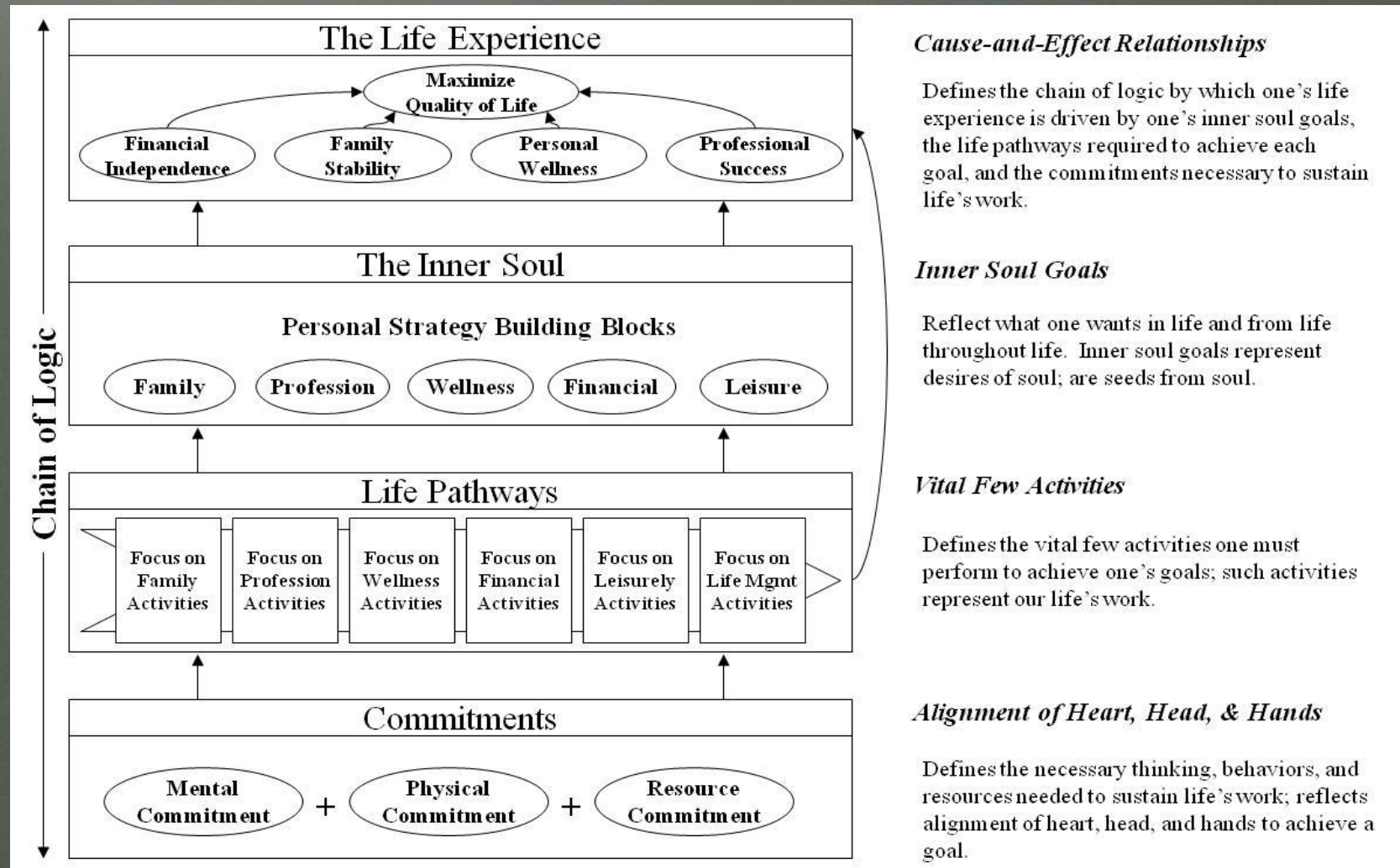
Component: Commitments



- Commitments represent the personal commitments you must make and keep to sustain life's work
 - There are three forms of personal commitment: Mental, Physical, and Resource
- Mental commitment reflects belief that the goal pursued (e.g. lose weight, pursue a college degree, start a business) is worth paying the price
- Physical commitment differs in intensity and form in that it represents a movement from belief to action; not only do I believe in my goal, I act in the service of my goal
- Resource commitment means to commit both YOUR time and YOUR money

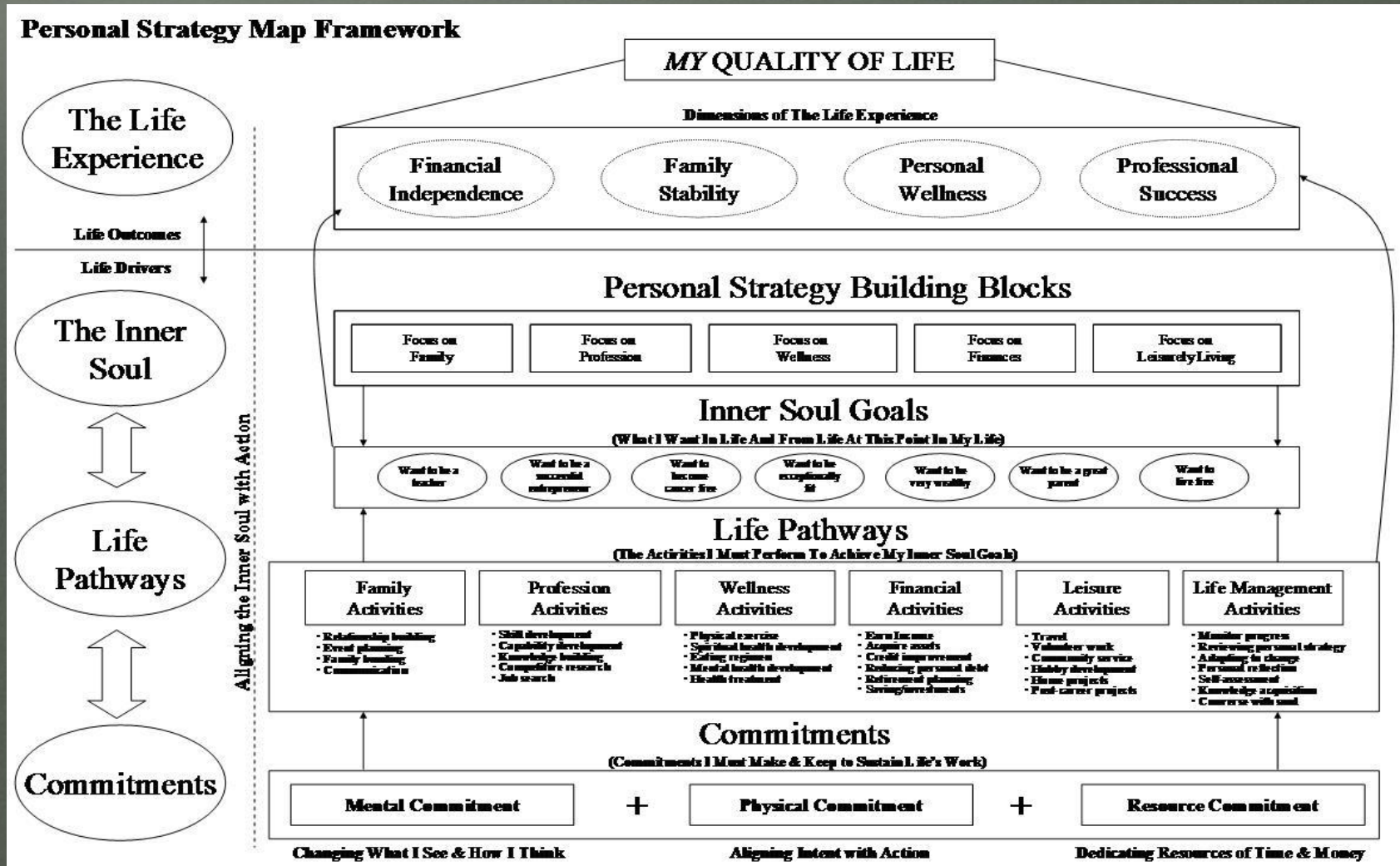
Key Components of Personal Strategy

Summary Level



How to Document Personal Strategy

PSM Framework

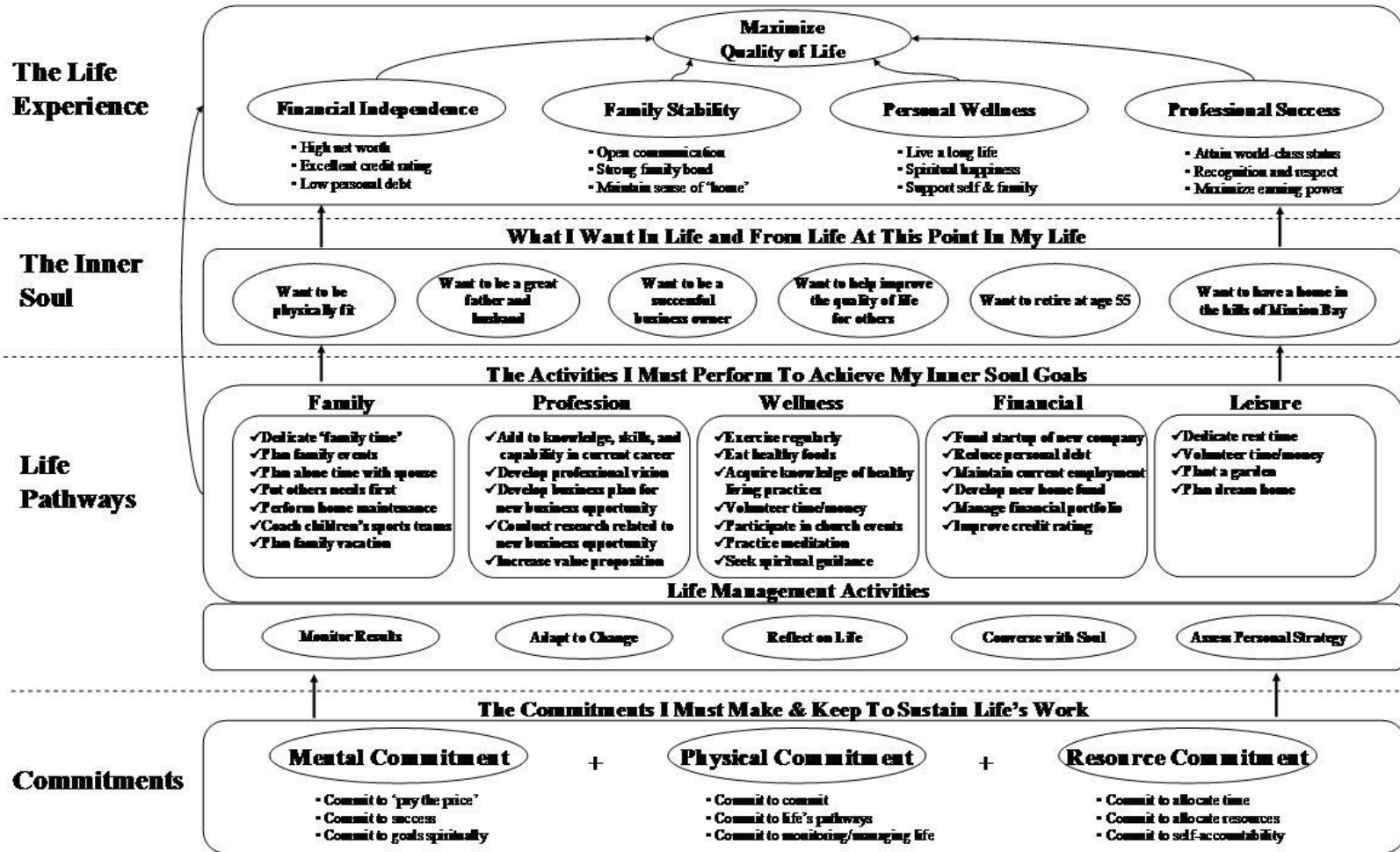


Personal Strategy Map

A Sample Personal Strategy for Living



Personal Strategy Map



Observations of Personal Strategy

- Represents a new life plan leading to a happier, more meaningful, and fragrant life experience
- Strategy is balanced across all personal strategy building blocks
- Strategy is focused on 5-7 inner soul goals
- Inner soul section represents what one wants in life and from life at this point in life
- Life pathways section highlights the vital few activities to achieve stated goals
- Commitments section highlights needed commitment to sustain life's work

Undesirable Present Position	Desirable Future Position
Overweight	Physically fit
Perceived as a less attentive father and husband	Perceived as a great father and husband
Spend little time helping others	Dedicated to helping others improve the quality of their life
Work for others	Work for self
Unable to retire at age 55	Able to retire at age 55
Location does not inspire soul	Living in a location of inspiration



Summary

- To have a personal strategy is to exercise choice; a choice that proudly asserts, *“I do not want to live an average life or simply get by. I want to live a remarkable life, and having a personal strategy will help me realize it”*. To exercise such choice mirrors an insight I obtained while selling insurance and that is: *“people do not plan to fail, they fail to plan”*
- The point is, if you do not have an explicit plan for your life, then, by default, you have NO plan and not having a plan for your life has but one outcome: **a life diminished**
- Developing personal strategy is becoming increasingly relevant given the complex and ever changing times in which we live. If we acknowledge the complex, fast-paced, competitive times in which we live, then having a method (i.e., **personal strategy**) to manage such complexity, manage such change would be of high value



Revisited: How Does One Develop Personal Strategy?

The Problem with New Year's Resolutions/ Ad-Hoc Personal Strategy

- Lack a holistic approach to define goals that span all dimensions of one's life (family, profession, wellness, financial, and leisure)
- Ad-hoc approach results in gaps in one's personal strategy
- The drivers of personal strategy (inner soul goals, life pathways, and commitments) and the cause and effect relations between them are largely ignored
- Inconsistent (or absent) approach to document and track goals over time
- Lack of supporting process to manage goals and adapt personal strategy as you change and your environment changes
- Approach lacks rigor, precision, and structure thereby diminishing the effectiveness of one's personal strategy and the likelihood of achieving goals



Why We Need Personal Strategy/Maps?

- Provides structure for defining, organizing, and documenting personal strategy
- Injects rigor to the process of developing personal strategy
- Ensures balance; results in well-defined strategy reflective of one's inner soul goals
- Enables quick development of personal strategy to realize dreams and maximize the quality of life
- Approaches building personal strategy from a systems (holistic) point of view
- Considers the design of personal strategy from multiple perspectives (family, profession, wellness, financial, and leisure)



A Strategy Driven Life

Next Episode Preview

- In this video training tutorial, we learned what personal strategy is, how to define personal strategy, and what personal strategy looks like
- Personal Strategy Maps are powerful tools for both visioning and implementing personal change
- However, use of PSMs alone is not enough, as they communicate only the 'what' of personal strategy. Consequently, our learning is incomplete, as we need to learn the 'how' of personal strategy; nuts and bolts details
- To do this, we utilize a companion framework to the PSM called a Personal Strategic Theme. In Part II, we discuss Personal Strategic Themes.



Thank You for Viewing!

If you have any questions or comments regarding this video training tutorial, please contact us on our voicemail hotline at (630) 451-1088 or email us at feedback@personalstrategy.org