



A Production of
The Personal Strategy Institute

How To Design a Personal Strategy for Living

Part 2 of 5

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What is Personal Strategy?

Part I - Recap

- We learned...
 - That the essence of Personal Strategy is to help us move from our present position in life to a more desirable, but uncertain, future position
 - That some of the benefits of having a personal strategy is that we are able to achieve our goals faster, with reduced effort and that we are enabled to maximize the personal, professional, and financial potential that life offers
 - What a Personal Strategy Map is and that a PSM is composed of four components: The Life Experience, The Inner Soul, Life Pathways, and Commitments
 - That the four components of a PSM are interconnected in a series of deliberate cause-and-effect relations that establish a “chain of linkage”
 - About each component discussing finer points about what The Life Experience, The Inner Soul, Life Pathways, and Commitments really mean
- Then we discussed the PSM Framework and how the framework brings together all the components of a PSM to form high-level personal strategy
- Finally, we looked at a sample Personal Strategy Map noting certain observations about the sample strategy and then concluded Part I by summarizing why we need a personal strategy
- Which brings us current, to discuss in Part II, what is a Personal Strategic Theme?



Introduction to Personal Strategic Themes

- In Part I, we learned how to define the ‘what’ of personal strategy using a Personal Strategy Map. Now, in Part II, we learn how to define the ‘how’ of personal strategy
- To do this, we utilize another framework from the personal strategy toolbox: a Personal Strategic Theme (PST)
- A PST is a companion framework to the PSM used to help define, organize, and document tactical level details to achieve a goal
- In Part II, you will learn that PSTs represent our ‘theories of success’; of how vision becomes reality. In short, they are our plans to which, and with which, we greet each day

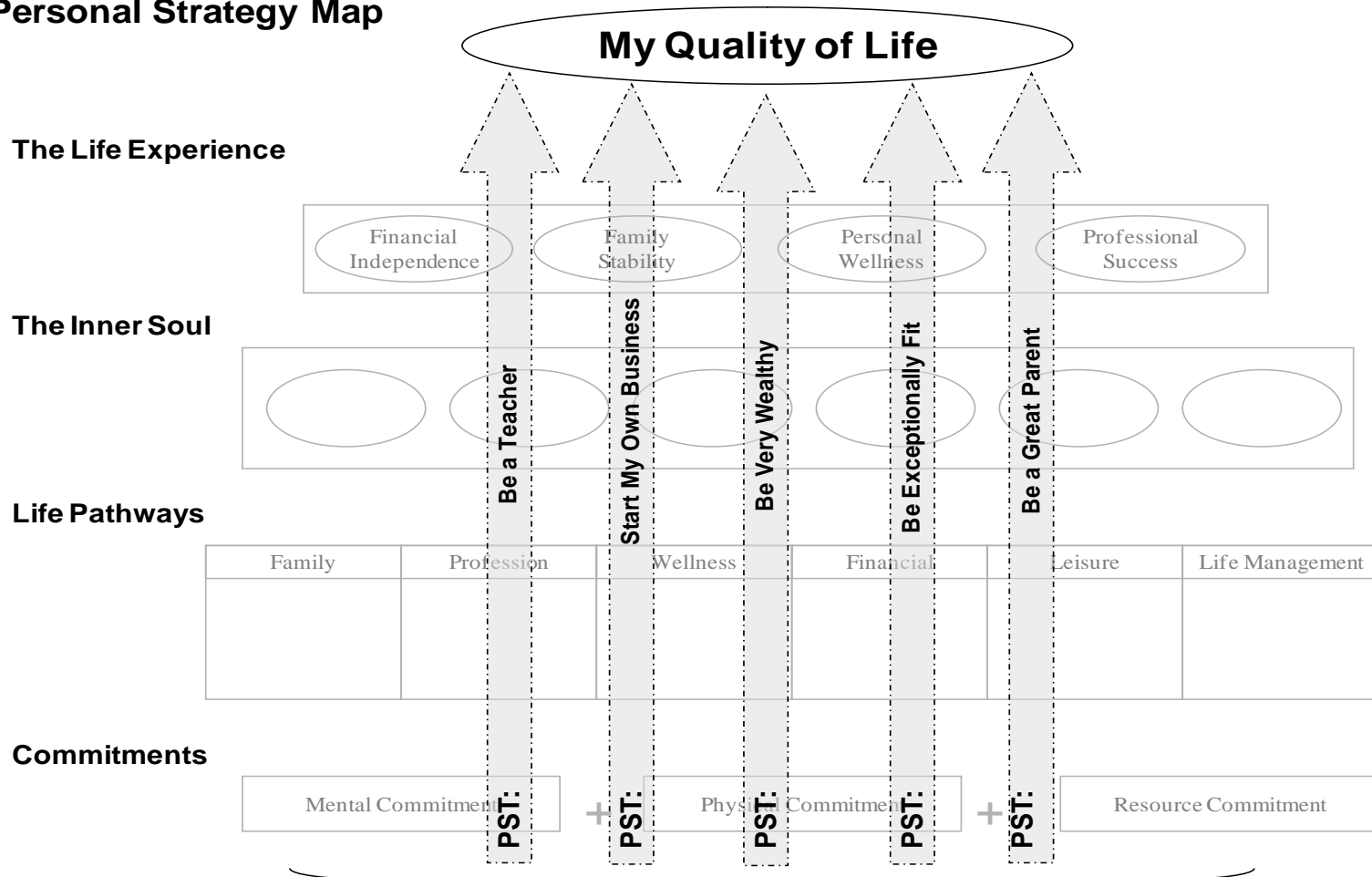


PSTs represent 'pieces' of our Personal Strategy - I

- The word 'theme' in Personal Strategic Themes represents, equates to a specific inner soul goal
- For example, if on our PSM one of our goals was to 'be exceptionally fit' then this goal would become a 'theme' of a PST
- Further, the PST would reflect content (i.e., strategy) related to achieving only this goal
- Consequently, if we view a PSM as a tool to help define and communicate our entire personal strategy, we can view a PST as a tool to help define and communicate a piece of our personal strategy

PSTs represent 'pieces' of our Personal Strategy - II

Personal Strategy Map



PST's represent 'pieces' of our personal strategy each focused on achieving a single Inner Soul Goal

Portfolio of Personal Strategic Themes



Personal Strategy Map

The Life Experience

- Financial Independence
- Family Stability
- Personal Wellness
- Professional Success

The Inner Soul

What I Want in Life and From Life At This Point in My Life:

- Want to be physically fit
- Want to be a great father and husband
- Want to be a successful business owner
- Want to help improve the quality of life for others
- Want to retire at age 55
- Want to have a home in the hills of Mission Bay

The 8 Pillars of Personal Strategy: Life, Family, Professional, Wellness, Financial, Leisure

My Inner Soul Goals

Want to be physically fit

Want to be a great father/husband

Want to be a successful business owner

Want to help improve the quality of life for others

Want to retire at age 55

Want a home in the hills of Mission Bay

Personal Strategic Theme

ePERSONAL STRATEGY MAP		PERSONAL SCORECARD		ACTION PLAN	
Theme: Be exceptionally fit	Goals	Measure	Target	Initiative	Budget
Wellness	1. Maintain regular exercise routine	% of days exercised	80%	1. Join a gym	\$1,000
Family	2. Spend quality time with family	Family time hours per week	10 hours	2. Schedule family time	\$0
Professional	3. Increase income	Annual income	\$100,000	3. Start a business	\$5,000

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Portfolio of Personal Strategic Themes

Personal Strategy Map vs. Personal Strategic Theme

Notable Differences



- Knowing the purposes of and differences between a PSM and a PST is important, as we need both frameworks to define personal strategy
- PSTs derive from PSMs and, therefore, like a PSM, are comprised of parts that work together as a system to achieve our goals

Personal Strategy Map	Personal Strategic Theme
Communicates our <u>entire</u> personal strategy	Communicates <u>a piece of</u> our personal strategy
Reflects all our inner soul goals	Reflects one inner soul goal
Reflects high-level activities to achieve all our inner soul goals	Reflects specific activities to achieve a single inner soul goal
Reflects high-level commitments to achieve all inner soul goals	Reflects specific commitments to achieve a single inner soul goal
We create one PSM	We create many PSTs
Represents whole (of personal strategy)	Represents part (of personal strategy)
Is the parent document	Is the child document



Components of a Personal Strategic Theme

- Embedded Personal Strategy Map (ePSM)
 - Details precise strategy to achieve a single inner soul goal
 - Reflects both visual and textual depiction of strategy
- Personal Scorecard
 - Details performance measures to monitor our progress
 - Tells us if our personal strategy is working
- Action Plan
 - Details specific initiatives and tasks to execute strategy
 - Represents our 'opening moves'
- As with the PSM, it is through purposeful cause and effect relations between the components of a Personal Strategic Theme that enable it to serve as a roadmap to achieve your goals

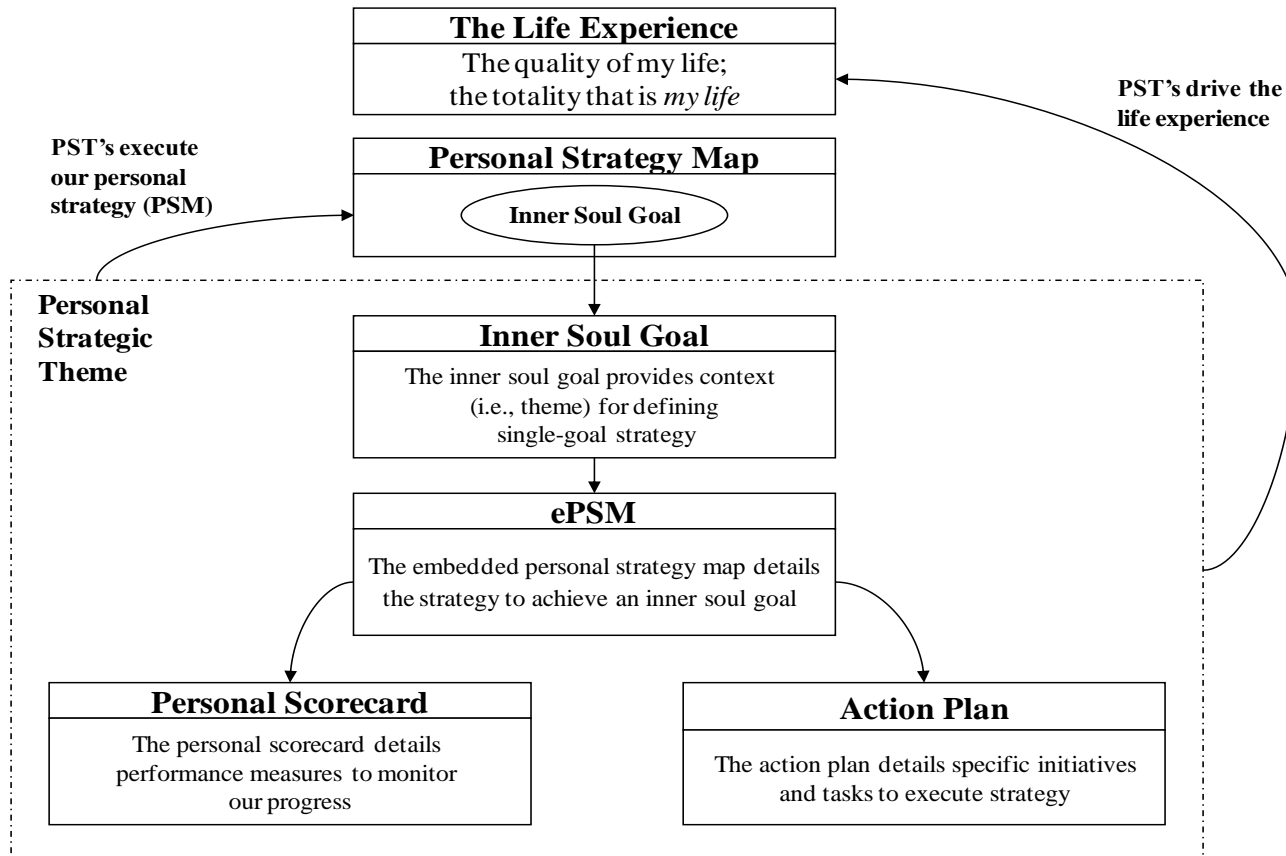
Personal Strategic Theme

A Roadmap to Achieve Your Goals

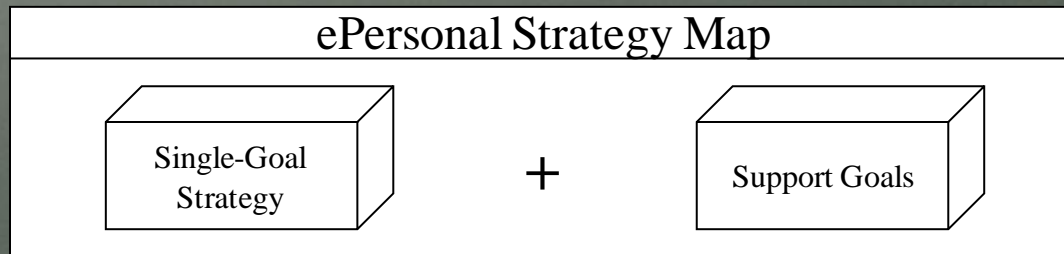


Personal Strategic Theme

A Roadmap to Achieve Your Goals



Component: Embedded Personal Strategy Map (ePSM)

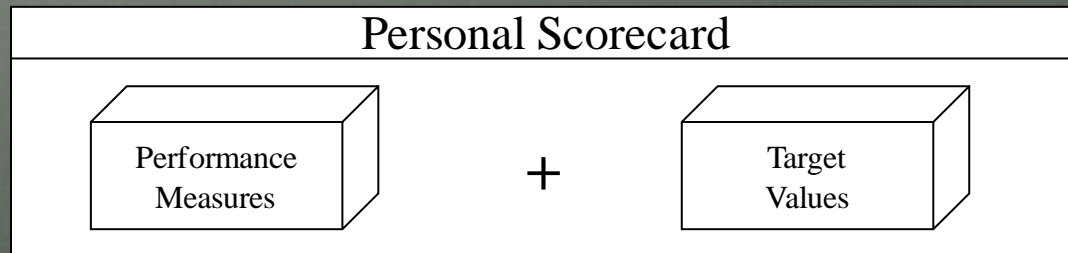


- When creating Embedded Personal Strategy Maps, our focus is to define strategy to achieve a single inner soul goal
- We do this as each inner soul goal is unique and, therefore, requires its own strategy
- The ePSM serves as a container to define, organize, and document strategy to achieve a single goal
- The components of an ePSM are the same as those that comprise our parent PSM with one additional component*
 - Inner soul goal
 - Life pathways
 - Commitments
 - Support goals*

What are Support Goals?

- Support goals...
 - Short-term, intermediate goals
 - Less significant, but no less important, goals
 - Drive our longer-term, primary inner soul goal
- An example...
 - Suppose you had a goal to 'start your own business'. What would be some short-term, intermediate goals to drive your primary goal
 - Develop business plan
 - Incorporate business
 - Develop product/service
 - Establish a line-of-credit
 - Develop marketing materials
 - Develop website/social media sites
 - Develop press release
 - Launch product/service
- The significance, relevance of support goals is such that if we achieve our support goals, we will, by default, achieve our inner soul goal

Component: Personal Scorecard - I



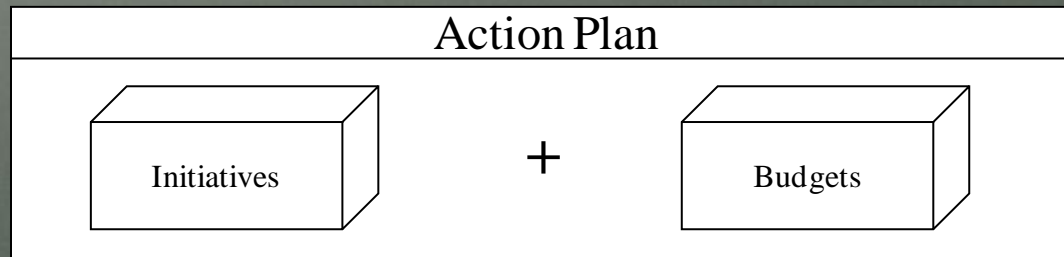
- We use performance measures to obtain feedback and to indicate progress with achieving our inner soul goal and support goals
- For example, if your inner soul goal is 'be exceptionally fit', you might define the following performance measures to indicate progress with achieving this goal:
 - # pounds weight lost/week
 - # times exercised/week
 - # hours exercised/week
 - # calories consumed/day
 - # calories burned exercising/week
 - # hours acquiring knowledge of healthy living practices/week
- By tracking the measures above, we can evaluate whether our strategy (e.g. ePSM) to become exceptionally fit is working



Component: Personal Scorecard - II

- For example, we may discover that...
 - Carbohydrate intake has no bearing on our fitness
 - Certain foods cause weight gain whereas others do not
 - Unless we exercise 10 hrs/week, we do not lose weight
 - Etc...
- In addition to identifying performance measures, we must also define target values for each measure
 - Target values represent a goal to which to strive for each measure
 - For example, we may specify a target value of [1,500] calories for the performance measure [# calories consumed/day] OR specify a target value of [5] for the performance measure [# times exercised/week]
- Regarding measures, we must define measures judiciously so as not to overburden ourselves with busy work
 - Limit the number of performance measures to between 3-5 for each inner soul goal
 - If you have (6) inner soul goals, you may have upwards of 30 performance measures across your entire personal strategy
 - Tracking, recording, and analyzing performance measures requires time, YOUR time; therefore, try to determine the 'vital few' measures that will serve as the best personal progress meters to drive goal achievement

Component: Action Plan

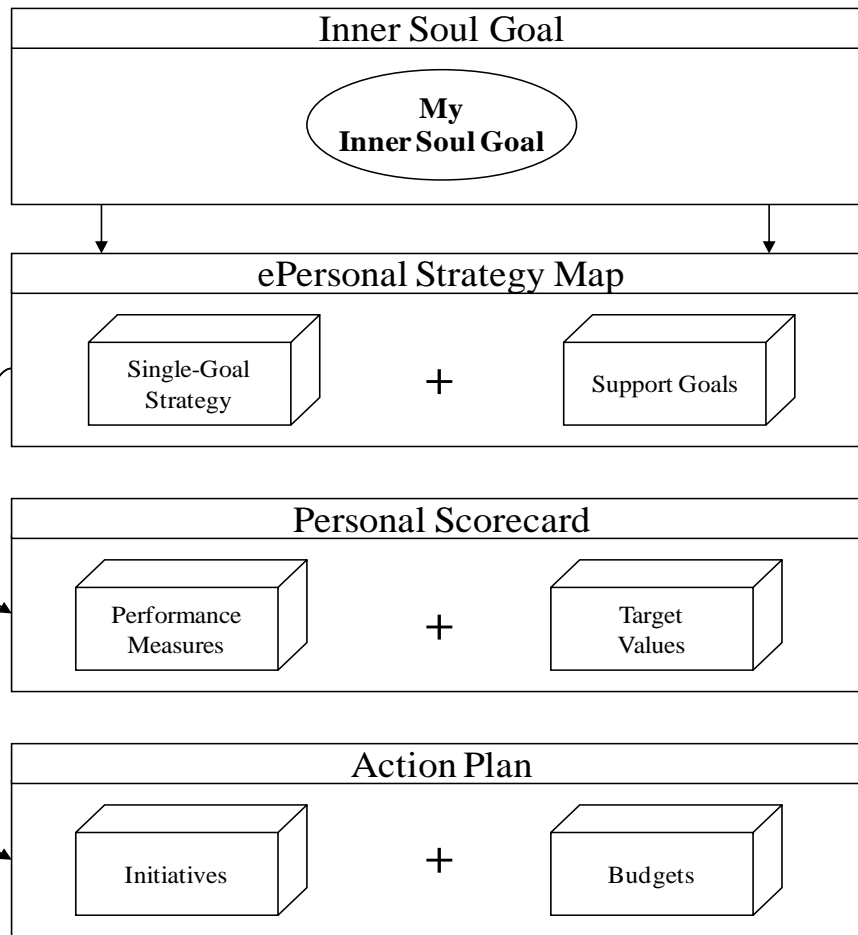


- Our action plan is comprised of two components: initiatives and budgets
 - Initiatives are comprised of tasks (specific actions we perform to achieve our goals)
- Initiatives are the mechanisms by which we execute our personal strategy
- For example, if I had an inner soul goal to ‘be exceptionally fit’ by reaching a weight of 205 lbs, I might define an initiative called: ‘Thrive and Alive at 205’
 - Tasks might include:
 - » Obtain gym membership
 - » Hire personal trainer
 - » Purchase exercise gear
 - » Enroll in nutrition education class
 - » Create exercise calendar

Key Components of Personal Strategy Summary Level



Personal Strategic Theme Components - Summary Level



Cause-and-Effect Relationships

Defines the chain of logic by which we achieve a goal through the coordinated thinking and acting of an ePSM, Personal Scorecard, and Action Plan. The power in applying this framework comes from knowing hidden cause and effect linkages exist between components.

Embedded Personal Strategy Map

Defines strategy to achieve a single inner soul goal by identifying the activities, commitments, and support goals in a system of interconnected components.

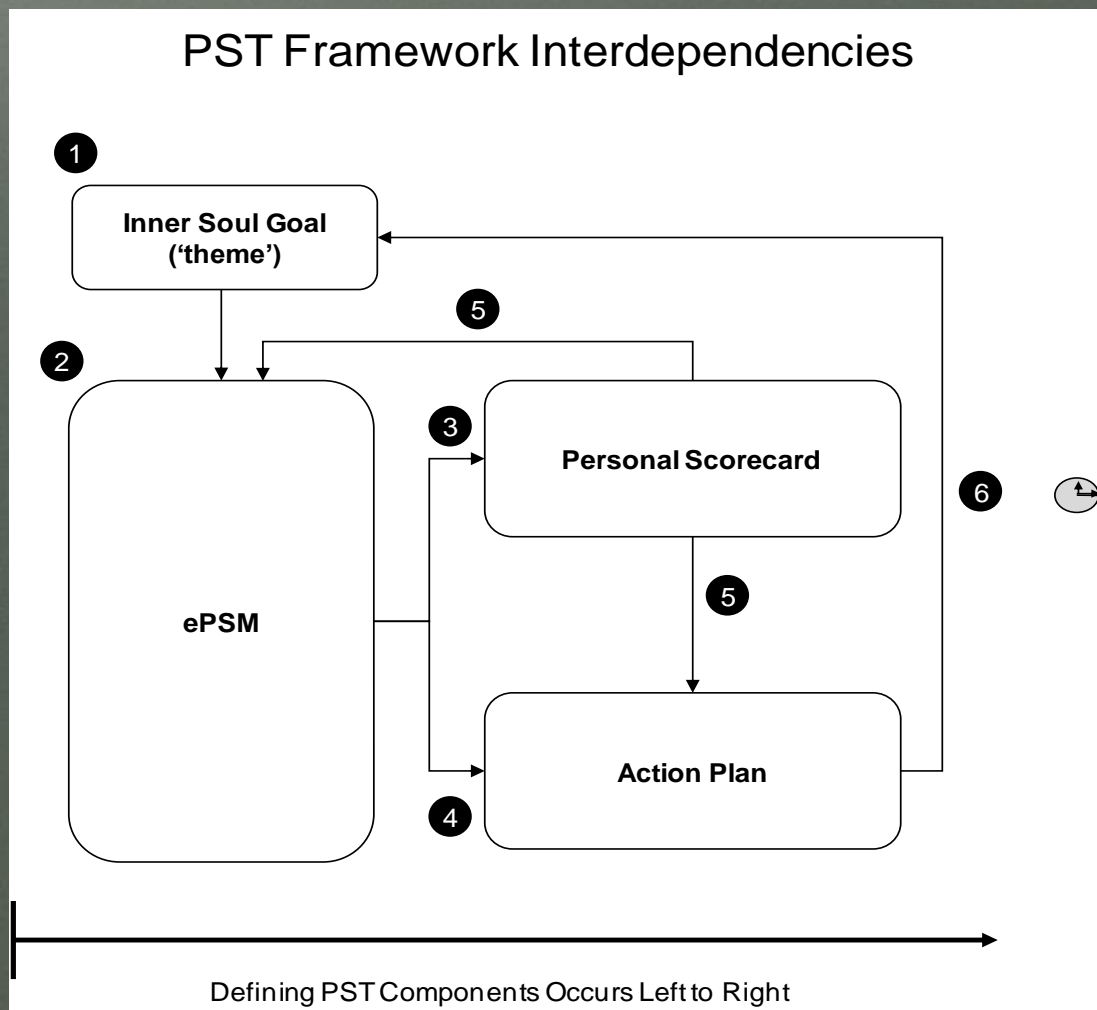
Personal Scorecard

Defines the performance measures and target values to indicate progress with achieving our support goals and inner soul goal.

Action Plan

Defines the initiatives, tasks, and budgets ('opening moves') to achieve both support goals and our inner soul goal.

PST Framework Interdependencies



Personal Strategic Theme

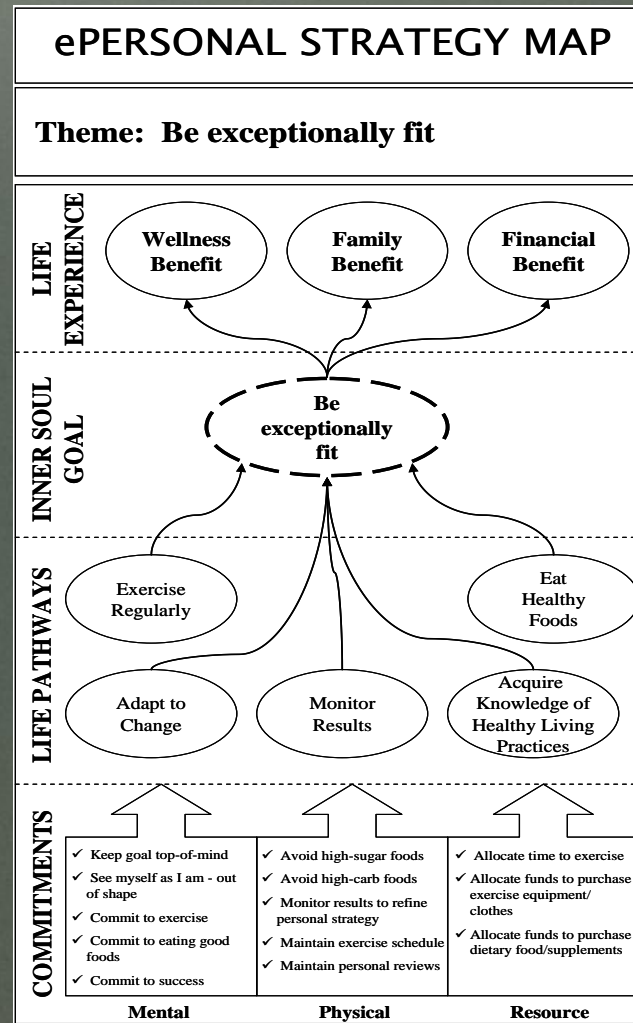
A Sample Personal Strategy for Living



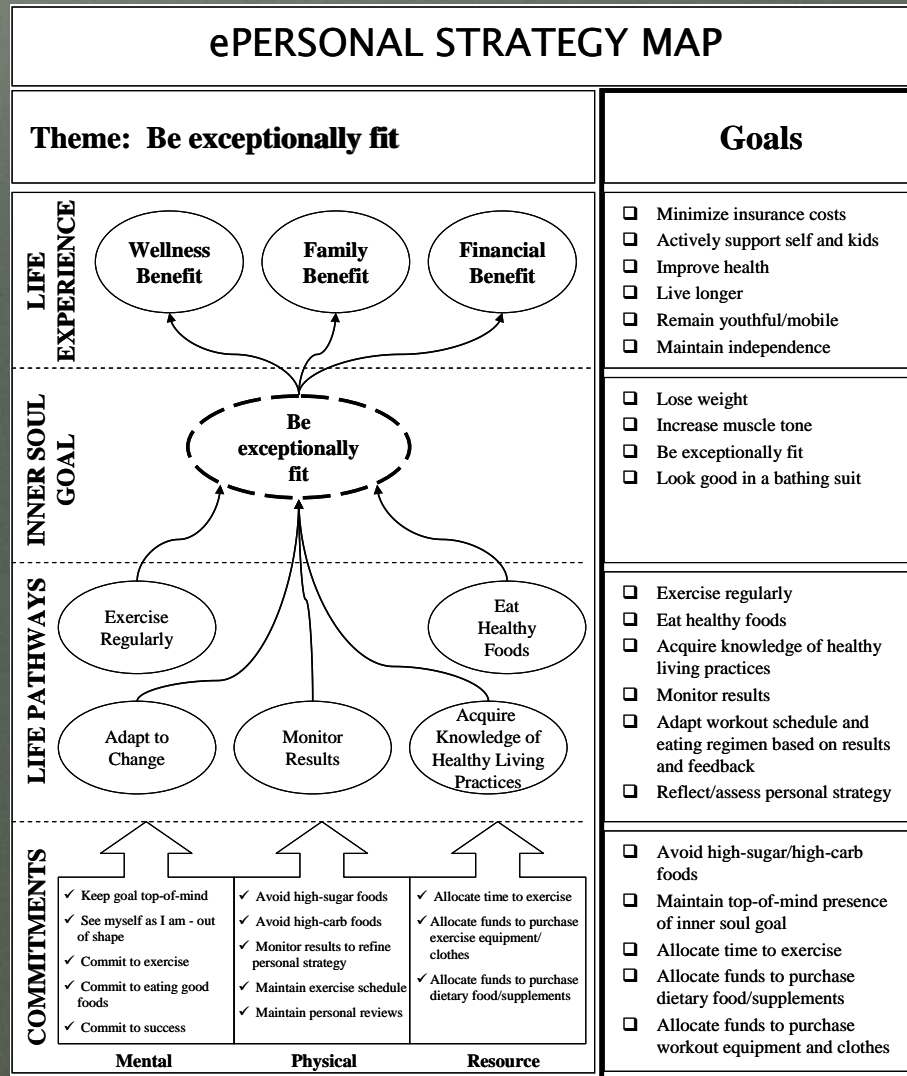
Personal Strategic Theme

ePERSONAL STRATEGY MAP		PERSONAL SCORECARD		ACTION PLAN		
Theme: Be exceptionally fit		Goals	Measure	Target	Initiative	Budget
LIFE EXPERIENCE Wellness Benefit Family Benefit Financial Benefit	INNER SOUL GOAL Be exceptionally fit	<input type="checkbox"/> Minimize insurance costs <input type="checkbox"/> Actively support self and kids <input type="checkbox"/> Improve health <input type="checkbox"/> Live longer <input type="checkbox"/> Remain youthful/mobile <input type="checkbox"/> Maintain independence			‘Thrive and Alive at 205’ <input type="checkbox"/> <u>Financial Tasks</u> <input checked="" type="checkbox"/> Obtain health-club membership <input checked="" type="checkbox"/> Purchase home gym equipment (sit-up bench, stretch mat, dumbbells) <input checked="" type="checkbox"/> Purchase exercise gear and shoes <input checked="" type="checkbox"/> Purchase initial supply of dietary food/supplements <input type="checkbox"/> <u>Non-Financial Tasks</u> <input checked="" type="checkbox"/> Identify and eliminate foods that are not part of healthy living plan <input checked="" type="checkbox"/> Plan time for daily/weekly reflection <input checked="" type="checkbox"/> Plan time to read healthy living literature <input checked="" type="checkbox"/> Create life-aids to keep my goal top-of-mind and in my face <input checked="" type="checkbox"/> Plan weekly exercise schedule/calendar <input checked="" type="checkbox"/> Communicate to others my goal and ask for support	<input type="checkbox"/> \$200 <input type="checkbox"/> \$125 <input type="checkbox"/> \$175 <input type="checkbox"/> \$125
		<input type="checkbox"/> Lose weight <input type="checkbox"/> Increase muscle tone <input type="checkbox"/> Be exceptionally fit <input type="checkbox"/> Look good in a bathing suit	<input type="checkbox"/> Body weight	<input type="checkbox"/> 200 lbs (loss of 40 lbs)		
		<input type="checkbox"/> Exercise regularly <input type="checkbox"/> Eat healthy foods <input type="checkbox"/> Acquire knowledge of healthy living practices <input type="checkbox"/> Monitor results <input type="checkbox"/> Adapt workout schedule and eating regimen based on results and feedback <input type="checkbox"/> Reflect/assess personal strategy	<input type="checkbox"/> # workouts/week <input type="checkbox"/> # carbs/day <input type="checkbox"/> # calories burned through exercise/week <input type="checkbox"/> # hours acquiring knowledge of healthy living practices/week	<input type="checkbox"/> 4 <input type="checkbox"/> <90 <input type="checkbox"/> 3,000 <input type="checkbox"/> 2		
		<input type="checkbox"/> Avoid high-sugar/high-carb foods <input type="checkbox"/> Maintain top-of-mind presence of inner soul goal <input type="checkbox"/> Allocate time to exercise <input type="checkbox"/> Allocate funds to purchase dietary food/supplements <input type="checkbox"/> Allocate funds to purchase workout equipment and clothes	<input type="checkbox"/> # hours allocated to aerobic/strength training exercise/week	<input type="checkbox"/> 5		
LIFE PATHWAYS Exercise Regularly Eat Healthy Foods Adapt to Change Monitor Results Acquire Knowledge of Healthy Living Practices	COMMITMENTS Mental <input checked="" type="checkbox"/> Keep goal top-of-mind <input checked="" type="checkbox"/> See myself as I am - out of shape <input checked="" type="checkbox"/> Commit to exercise <input checked="" type="checkbox"/> Commit to eating good foods <input checked="" type="checkbox"/> Commit to success Physical <input checked="" type="checkbox"/> Avoid high-sugar foods <input checked="" type="checkbox"/> Avoid high-carb foods <input checked="" type="checkbox"/> Monitor results to refine personal strategy <input checked="" type="checkbox"/> Maintain exercise schedule <input checked="" type="checkbox"/> Maintain personal reviews Resource <input checked="" type="checkbox"/> Allocate time to exercise <input checked="" type="checkbox"/> Allocate funds to purchase exercise equipment/clothes <input checked="" type="checkbox"/> Allocate funds to purchase dietary food/supplements					
					Total Budget	\$ 625

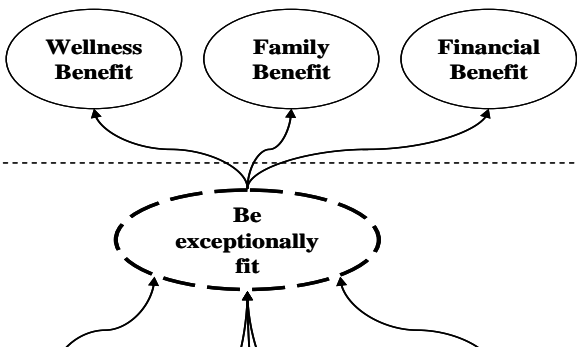
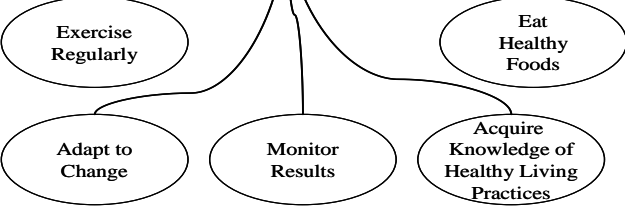
Sample PST: ePSM Component - I



Sample PST: ePSM Component - II



Sample PST: Personal Scorecard Component - I

ePERSONAL STRATEGY MAP			PERSONAL SCORECARD		
Theme: Be exceptionally fit			Goals		
LIFE EXPERIENCE			<ul style="list-style-type: none"> <input type="checkbox"/> Minimize insurance costs <input type="checkbox"/> Actively support self and kids <input type="checkbox"/> Improve health <input type="checkbox"/> Live longer <input type="checkbox"/> Remain youthful/mobile <input type="checkbox"/> Maintain independence 		
INNER SOUL GOAL	Be exceptionally fit		<ul style="list-style-type: none"> <input type="checkbox"/> Lose weight <input type="checkbox"/> Increase muscle tone <input type="checkbox"/> Be exceptionally fit <input type="checkbox"/> Look good in a bathing suit 		
LIFE PATHWAYS			<ul style="list-style-type: none"> <input type="checkbox"/> Exercise regularly <input type="checkbox"/> Eat healthy foods <input type="checkbox"/> Acquire knowledge of healthy living practices <input type="checkbox"/> Monitor results <input type="checkbox"/> Adapt workout schedule and eating regimen based on results and feedback <input type="checkbox"/> Reflect/assess personal strategy 		
COMMITMENTS	<ul style="list-style-type: none"> ✓ Keep goal top-of-mind ✓ See myself as I am - out of shape ✓ Commit to exercise ✓ Commit to eating good foods ✓ Commit to success 	<ul style="list-style-type: none"> ✓ Avoid high-sugar foods ✓ Avoid high-carb foods ✓ Monitor results to refine personal strategy ✓ Maintain exercise schedule ✓ Maintain personal reviews 	<ul style="list-style-type: none"> ✓ Allocate time to exercise ✓ Allocate funds to purchase exercise equipment/clothes ✓ Allocate funds to purchase dietary food/supplements 	<ul style="list-style-type: none"> <input type="checkbox"/> Avoid high-sugar/high-carb foods <input type="checkbox"/> Maintain top-of-mind presence of inner soul goal <input type="checkbox"/> Allocate time to exercise <input type="checkbox"/> Allocate funds to purchase dietary food/supplements <input type="checkbox"/> Allocate funds to purchase workout equipment and clothes 	
Mental	Physical	Resource	Measure	Target	
			<ul style="list-style-type: none"> <input type="checkbox"/> Body weight 	<ul style="list-style-type: none"> <input type="checkbox"/> 200 lbs (loss of 40 lbs) 	
			<ul style="list-style-type: none"> <input type="checkbox"/> # workouts/week <input type="checkbox"/> # carbs/day <input type="checkbox"/> # calories burned through exercise/week <input type="checkbox"/> # hours acquiring knowledge of healthy living practices/week 	<ul style="list-style-type: none"> <input type="checkbox"/> 4 <input type="checkbox"/> <90 <input type="checkbox"/> 3,000 <input type="checkbox"/> 2 	
			<ul style="list-style-type: none"> <input type="checkbox"/> # hours allocated to aerobic/strength training exercise/week 	<ul style="list-style-type: none"> <input type="checkbox"/> 5 	



Sample PST: Personal Scorecard Component - II

Support Measure	ePSM Section	Significance of Measure
# workouts/week	Life Pathways	Exercise has a direct impact on body weight and degree of fitness. Generally, the more we exercise the more fit we become. Therefore, tracking the number of times exercised per week will not only remind us to exercise, but will also drive our primary measure: body weight.
# carbohydrates consumed/day	Life Pathways	For some people, increased carbohydrate consumption, results in increased weight gain. Consequently, tracking the number of carbs consumed daily will not only remind us to limit carbs but also drives our primary measure: body weight.
# calories burned through exercise/week	Life Pathways	This measure speaks to the quality of our workouts, knowing the more we exert, the more we benefit.
# hours acquiring knowledge of healthy living practices/week	Life Pathways	As achieving fitness requires lifestyle changes beyond exercise, we record the number of hours spent acquiring knowledge of healthy living practices, as this activity will ensure healthy living remains in our face and top-of-mind.
# hours allocated to aerobic/strength training exercise/week	Commitments	To drive commitment, we establish a support goal tracking the number of hours we exercise a week.

Sample PST: Action Plan Component

ePERSONAL STRATEGY MAP		PERSONAL SCORECARD		ACTION PLAN			
Theme: Be exceptionally fit		Goals	Measure	Target	Initiative	Budget	
<p>LIFE EXPERIENCE</p> <p>Wellness Benefit Family Benefit Financial Benefit</p> <hr/> <p>INNER SOUL GOAL</p> <p>Be exceptionally fit</p> <hr/> <p>LIFE PATHWAYS</p> <p>Exercise Regularly Eat Healthy Foods</p> <p>Adapt to Change Monitor Results Acquire Knowledge of Healthy Living Practices</p> <hr/> <p>COMMITMENTS</p> <table border="0"> <tr> <td style="vertical-align: top;"> <p>Mental</p> <ul style="list-style-type: none"> ✓ Keep goal top-of-mind ✓ See myself as I am - out of shape ✓ Commit to exercise ✓ Commit to eating good foods ✓ Commit to success </td> <td style="vertical-align: top;"> <p>Physical</p> <ul style="list-style-type: none"> ✓ Avoid high-sugar foods ✓ Avoid high-carb foods ✓ Monitor results to refine personal strategy ✓ Maintain exercise schedule ✓ Maintain personal reviews </td> <td style="vertical-align: top;"> <p>Resource</p> <ul style="list-style-type: none"> ✓ Allocate time to exercise ✓ Allocate funds to purchase exercise equipment/clothes ✓ Allocate funds to purchase dietary food/supplements </td> </tr> </table>	<p>Mental</p> <ul style="list-style-type: none"> ✓ Keep goal top-of-mind ✓ See myself as I am - out of shape ✓ Commit to exercise ✓ Commit to eating good foods ✓ Commit to success 	<p>Physical</p> <ul style="list-style-type: none"> ✓ Avoid high-sugar foods ✓ Avoid high-carb foods ✓ Monitor results to refine personal strategy ✓ Maintain exercise schedule ✓ Maintain personal reviews 	<p>Resource</p> <ul style="list-style-type: none"> ✓ Allocate time to exercise ✓ Allocate funds to purchase exercise equipment/clothes ✓ Allocate funds to purchase dietary food/supplements 	<ul style="list-style-type: none"> <input type="checkbox"/> Minimize insurance costs <input type="checkbox"/> Actively support self and kids <input type="checkbox"/> Improve health <input type="checkbox"/> Live longer <input type="checkbox"/> Remain youthful/mobile <input type="checkbox"/> Maintain independence 			<p>'Thrive and Alive at 205'</p> <ul style="list-style-type: none"> <input type="checkbox"/> <u>Financial Tasks</u> ✓ Obtain health-club membership <input type="checkbox"/> \$200 ✓ Purchase home gym equipment (sit-up bench, stretch mat, dumbbells) <input type="checkbox"/> \$125 ✓ Purchase exercise gear and shoes <input type="checkbox"/> \$175 ✓ Purchase initial supply of dietary food/supplements <input type="checkbox"/> \$125 <input type="checkbox"/> <u>Non-Financial Tasks</u> ✓ Identify and eliminate foods that are not part of healthy living plan ✓ Plan time for daily/weekly reflection ✓ Plan time to read healthy living literature ✓ Create life-aids to keep my goal top-of-mind and in my face ✓ Plan weekly exercise schedule/calendar ✓ Communicate to others my goal and ask for support
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Total Budget					\$ 625		



Summary

- A PST is a framework we use to define, organize, document, and implement tactical level strategy to achieve a goal. PSTs reflect single goal strategy and are comprised of parts that work together as a system for a common goal
- Creating Personal Strategic Themes requires effort. The more inner soul goals you have, the more effort is required to define personal strategy
 - Guideline: Limit your inner soul goals to between 5-7 goals
- Defining personal strategy to the level of specificity suggested with the PST Framework is necessary to achieve your goals
 - Without doing so, any attempt at achieving a goal will be just that: an attempt
- Despite the occasional doubts that you may have about your personal strategy or the effort required to execute personal strategy, do not let the dream die
 - Developing, and then living by a personal strategy requires an act of faith that the process and the effort will transform your life for the better, forever

A Strategy Driven Life

Next Episode Preview



- Up to this point we have...
 - Defined what is Personal Strategy
 - Defined the primary tools and frameworks to compose personal strategy
 - Personal Strategy Maps
 - Personal Strategic Themes
 - Reviewed samples of both to see what Personal Strategy looks like
- Therefore, with theory behind us and practical examples to work from, in the next episode, Part III, we apply recent learning's by using such tools and frameworks to build your personal strategy



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